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ABSTRACT

This food production, management, and services teacher guide contains eight units: (1) orientation; (2) tools and functions of management; (3) cost controls; (4) keeping records; (5) purchasing and receiving; (6) storing and issuing; (7) personnel management; and (8) human relations. Suggestions are included to increase reinforcement of the academic and workplace basic skills. Each unit contains some or all of the following sections: (1) objective sheet--including unit and specific objectives; (2) suggested activities--instructional plan, teacher suggestions, resources used in developing unit, suggested supplemental resources, and instructions for evaluating student performance; (3) answers to assignment sheet; (4) answers to written test; (5) written test; (6) unit evaluation form; (7) information sheet; (8) student supplement(s); (9) assignment sheet(s); (10) job sheet(s); and (11) disseminating material. The guide also includes the following: competency profile; instructional/task analysis; related academic and workplace skills list; 19 references; and glossary. (NLA)

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Food Production, Management, and Services: Management

Teacher Edition

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Foreword

When the MAVCC staff began the process of revising the Food Production, Management, and Services series, it was found that the content presented was relatively sound and that the materials were presented in a logical manner to assist students in mastering the skills of their chosen occupation. This series contains a core publication, *Introduction*, and five spin-off publications, *Service*, *Production*, *Baking*, *Fast Foods*, and *Management*. Students may specialize in any of several occupations related to the food service area.

The success of this series of publications is due, in large part, to the capabilities of the personnel who worked with its development. Appreciation is extended to them for their valuable contributions to the publications.

These materials are not only designed for student use, but to assist teachers in improving instruction. Instructional materials in this publication are based on the competency-based concept of first stating the objectives (objective sheet), teaching to the objectives (information, assignment, and job sheets), and assessing to those same objectives (criterion-referenced evaluation instruments).

Every effort has been made to make these materials basic, readable, and by all means, useable. Three vital parts of instruction have been intentionally omitted from each publication: motivation, personalization, and localization. These areas are left to the individual instructors to present as part of their classroom/laboratory discussion.

Special attention should be given to the suggestions on ways to increase reinforcement of the academic and workplace basic skills. By reinforcing these skills, the instructor should assist students in improving their employability skills.

As you use these instructional materials, we hope that you will find that they contribute to the quality of your program. If any problems occur or if you have any suggestions for improvement of the materials, please call or write us.

Sylvia Clark, Chairman
Board of Directors
Mid-America Vocational
Curriculum Consortium

Jim Steward
Executive Director
Mid-America Vocational
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Committee

Virginia Bechtold	Nebraska
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A final thank you to Mary Kellum for her assistance in editing and developing this second edition and to Jane Huston for her assistance in coordinating this project.

Use of Introductory Materials

Introductory materials are included in the teacher guide only and contain useful information to assist administrators and teachers in planning for instruction.

In addition to the general information such as the table of contents, foreword, and acknowledgements page, information is included on the following:

1. **Use of this publication**—Explains the components of a unit of instruction and how they should be used as part of the teaching/ learning process.
2. **Competency profile**—Provides a record of student performance for each task included in a unit of instruction. This becomes a part of the student's permanent records and should be utilized when directing the student toward employment opportunities.
3. **Instructional/task analysis**—Provides a quick review of contents of the publication; identifies cognitive (knowledge) skills and psychomotor (doing) skills addressed in each unit of instruction.
4. **Related academic and workplace skills list**—Classifies unit tasks (assignment sheets) according to related academic and workplace skills being reinforced. Skill areas reflected by skill groups, sub skills, and descriptions have been identified using *Workplace Basics: The Skills Employers Want*, developed by the American Society for Training and Development (ASTD) and the U.S. Department of Labor and adapted by MAVCC.
5. **Reference list**—Provides a comprehensive list of resources used in the development of this publication.
6. **Glossary** — Provides a list of terms and definitions used in the publication.

As you use these materials, it is hoped that they will provide useful information to meet a variety of needs.

Use of This Publication

Instructional units

Food Production, Management, and Services: Management contains eight units of instruction. Each instructional unit in a teacher guide includes some or all of the following basic components of a unit of instruction: objective sheet, suggested activities for the teacher, answers to assignment sheets, answers to written test, written test, unit evaluation form, teacher supplements, transparency masters, information sheet, assignment sheets, student supplements, and job sheets.

All of the unit components focus on measurable and observable learning outcomes. Teachers are encouraged to supplement, personalize, localize, and motivate with these materials in order to develop a complete teaching/learning process.

Units of instruction are designed for use in more than one lesson or class period of instruction. Careful study of each unit of instruction by the teacher will help to determine the following:

- Amount of materials that can be covered in each class period.
- Skills that must be demonstrated.
- Amount of class time needed for demonstrations.
- Amount of time needed for student practice.
- Supplementary materials, including print and nonprint media and equipment and supplies, that must be ordered.
- Resource people who must be contacted.

Objective sheet (Color code: White)

Each unit of instruction is based on performance objectives which state the goals for successful completion of the course. These performance objectives are stated in two forms: unit objectives which state the expected performance of each student after completion of the unit of instruction, and specific objectives which state what the student must do to reach the unit objective.

The objectives should be provided for students and stressed throughout the teaching/learning process. This will help answer any questions concerning performance requirements for each instructional unit. The objectives can also help determine teaching strategies and instructional methods. Teachers should prepare for each unit by deciding how each objective can best be taught.

Teachers should feel free to modify, delete, or add objectives in order to meet the needs of the students and community. When objectives are added, the teacher should remember to supply the needed information, assignment and/or job sheets, and criterion test items.

Suggested activities (Color code: Pink)

This component is included only in the teacher guide. The suggested activities assist teachers during the preparation stage of the teaching/learning process by providing an instructional plan, teaching suggestions, and a list of supplemental resources. Ways to integrate academic and workplace skills have been included in the teacher suggestions, and skill areas have been noted in bold. (A table of academic and workplace skills with accompanying definitions has been provided on page xv.) The teacher should read the suggested activities before teaching the units and decide how each objective can best be taught. Time should also be allowed to obtain supplemental materials, prepare audiovisual materials, and contact outside resources. Duties of the teacher will vary according to the particular unit.

References used in the development of each unit are listed in the suggested-activities section, along with suggested supplemental resources that may be used to teach the unit. These materials can be used by the teacher to supplement her or his knowledge of the subject area or to help students with particular interests or objectives in the area covered.

Instructions for evaluating student performance on the job sheets are also included in the suggested-activities section. Teachers should select and discuss with students the rating scale that will be used.

Assignment and written test answers (Color code: Pink)

Assignment-sheet answers and written-test answers are designed to assist the teacher in evaluation of student performances.

Written test (Color code: Yellow)

This component provides criterion-referenced evaluation of every cognitive objective listed in the unit of instruction. The test appears in the teacher guide only, but duplication is permitted for student use. If objectives have been added, deleted, or modified, appropriate changes should be made on the written test. It is recommended that the tests be divided into shorter tests covering three or four objectives at a time and given soon after those objectives have been covered. A selection of test items from the units covered may be used for final tests at the end of each term if desired.

Unit evaluation form (Color code: White)

This sheet provides teachers with a record of each students performance on a unit of instruction. It includes space for assignment sheet ratings, job sheet ratings, written test scores, and teacher comments. The unit evaluation form is included in the teacher guide only, but may be duplicated.

Use of This Publication

Teacher supplements (Color code: White)

This component is included only in the teacher guide. Teacher supplements are optional materials for the teacher to use. They have three purposes: to provide the teacher with higher level materials to stretch the advanced student, with remedial information or practice to assist the less-advanced student, and with state-of-the-art information in which the teacher may not have background or with information that is not readily available in other books. Some teacher supplements may be duplicated for student use and are marked accordingly.

Transparency masters (Color code: White)

Transparencies are included in the teacher guide only and are used to direct the students' attention to the topic of discussion. They may provide illustrations, charts, schematics, or additional information needed to clarify and reinforce objectives included in the unit of instruction.

Information sheet (Color code: Green)

The information sheet provides the content essential for meeting the cognitive (knowledge) objectives of the unit. Teachers will find that the information sheet serves as an excellent guide for presenting background knowledge necessary to develop the skills specified in the unit objective. Students should read the information sheet before the information is discussed in class. Space is provided in margins for students and teachers to add notes that supplement, localize, personalize, or provide information for the teaching of each objective.

Student supplements (Color code: White)

Student supplements are included in the student manual. The information presented in a student supplement may consist of tables, charts, written information, forms, or other information students will need in order to complete one or more of the assignment and/or job sheets. Students are not directly tested over the information presented in a supplement; however, their ability to apply this information may be evaluated in the completion of assignment sheets or job sheets.

Assignment sheets (Color code: Tan)

Assignment sheets provide students with pencil and paper activities that give students the opportunity to make practical application of the knowledge in the information sheet. Criteria are provided to objectively evaluate student performance.

Job sheets (Color code: Blue)

The job sheets provide criteria to objectively evaluate student performance, a list of required equipment and materials, and a step-by-step procedure for performing a psychomotor skill. The teacher should discuss the equipment and materials available in the classroom and/or laboratory and demonstrate the procedure prior to having students practice procedure. When a student is ready to be evaluated, the teacher should follow instructions for evaluating student performance which may be found in the teacher guide.

Job sheets are an important segment of each unit. Job sheets provide potential employers with a picture of the skills being taught during training and the performances that might reasonably be expected from an individual who has had this training.

Disseminating material

Material may be given out a unit or page at a time to keep the material before the student always new. Some teachers ask students to furnish a three-ring binder or folder for the current unit of study. This is convenient for students taking the material home to study. Upon completion, each unit is then placed in a larger binder. Some teachers prefer to store the material by unit in filing cabinets or boxes until needed.

For best results, provide student materials for each student. Student manuals contain objective sheets, information sheets, student supplements, assignment sheets, and job sheets. Students should be allowed to take their materials home at the end of the course.

Academic and Workplace Skills
(Classifications and Definitions)

Skill Groups	Sub Skills	Definitions
Learning Skills	Learning to learn	Developing ability to apply knowledge to other situations; knowing how to learn.
Foundation Skills	Reading	Comprehending written information and analyzing, summarizing, and applying what has been read to a specific task.
	Writing	Communicating a thought, idea or fact in written form in a clear, concise manner.
	Math	Applying computation skills such as reasoning, estimation, and problem solving as they are actually used on the job.
	Science	Applying knowledge learned through study or practice that is based on scientific principles as they relate to specific tasks.
Communication Skills	Listening	Listening for content, conversation, long-term contexts, emotional meaning, and directions.
	Oral communication	Communicating a thought, idea, or fact in spoken form in a clear, concise manner.
Adaptability Skills	Creative thinking	Using imagination to create something new—i.e. an idea, invention, work of art.
	Problem solving (critical thinking)	Recognizing and defining problems, inventing, and implementing solutions, and tracking and evaluating results.
Personal Management Skills	Self-esteem	Developing self-confidence and creating a positive self-image.
	Motivation/goal setting	Setting and meeting defined goals and objectives.
	Personal and career development	Emphasizing self-direction by establishing and implementing a plan.
Group Effectiveness Skills	Interpersonal relations	Developing ability to maintain positive relations with others.
	Negotiation	Resolving conflict between two or more individuals.
	Teamwork	Working together in a group to reach a common goal.
Influence Skills	Organizational effectiveness	Adapting to the organization's goals, values, culture, and traditional modes of operation.
	Leadership	Directing/influencing group in performance of a specific task; accepting responsibility for others.

Food Production, Management, and Services: Management

Competency Profile

Name: ______________________________

Directions: Evaluate the student using the rating scale below. Write the appropriate number to indicate the degree of competency achieved. The descriptions associated with each of the numbers focused on a level of student performance for each of the tasks listed. The written test scoreline is provided for optional teacher use. It may not be applicable in all cases.

Option A

Rating scale:	4 -	Skilled - Can perform job with no additional training.
	3 -	Moderately Skilled - Has performed job during training program; limited additional training may be required.
	2 -	Limited Skill - Has performed job during training program; additional training is required to develop skill.
	1 -	Unskilled - Is familiar with process, but is unable to perform job.
	0 -	No Exposure - No information or practice provided during training program, complete training required.
	NA -	Non-applicable.

Option B

Yes - Can perform with no additional training
No - Is unable to perform satisfactorily

Unit 1: Orientation

______1. Complete and discuss a personal management potential survey.
______2. Complete a checklist on what is most important to you in a job.
______3. Construct a personal career ladder.
______4. ______________________________

______Written Test Score

Unit 2: Tools and Functions of Management

______1. Develop a job description for a waiter/waitress.
______2. Schedule waiters/waitresses for a given restaurant operation.
______3. ______________________________

______Written Test Score

Unit 3: Cost Controls

______1. Determine the cost per portion of given recipes.
______2. Identify purchasing control problems
______3. Identify storage control problems.
______4. Solve problems concerning ways to reduce labor costs.
______5. ______________________________

______Written Test Score

Unit 4: Keeping Records

______1. Complete meal census for one week.
______2. Complete daily and weekly cash reports.
______3. Complete a food cost summary.
______4. Calculate labor costs.
______5. Complete a labor cost summary.
______6. Complete a profit/loss summary.
______7. ____

______Written Test Score

Unit 5: Purchasing and Receiving

______1. Complete a purchasing chart to show amounts to order.
______2. Complete a purchasing chart to show amounts needed.
______3. Complete a food purchase checklist.
______4. Complete a food receiving checklist.
______5. Write specifications for a canned food, a fresh food, and a frozen food.
______6. ____

______Written Test Score

Unit 6: Storing and Issuing

______1. Identify proper storage areas for given foods and nonfood items.
______2. Prepare storeroom requisitions.
______3. Complete a physical inventory.
______4. Complete a food service security checklist.
______5. ____

______Written Test Score

Unit 7: Personnel Management

______1. Write a classified ad.
______2. Write interview questions.
______3. Conduct an interview.
______4. Train an employee using the four step training method.
______5. Complete a questionnaire on the effectiveness of a performance appraisal system.
______6. ____

______Written Test Score

Unit 8: Human Relations

_____1. Solve problems concerning initiating change in the work environment.
_____2. Solve problems concerning techniques for encouraging cooperation.
_____3. Solve problems concerning ways to deal with employee problems.
_____4. ______________________________

_____Written Test Score

COMMENTS: ______________________________

____

____

____

____

Evaluator: ____________________ Date: ____________________

* Permission to duplicate this profile is granted.

Food Production, Management, and Services: Management

Instructional/Task Analysis

Related Information: What the Student Should Know

Application: What the Student Should Be Able to Do

Unit 1: Orientation

1. Terms and definitions
2. Job opportunities in food service management
3. Benefits of a management position
4. Hardships posed by a management position
5. Basic skills in food service management
6. Successful management qualifications
7. Types of people food service management attracts
8. Traditional ways to become a food service manager
9. Tips for improving managerial potential
10. Complete and discuss a personal management potential survey
11. Complete a checklist on what is most important to you in a job
12. Construct a personal career ladder

Unit 2: Tools and Functions of Management

1. Terms and definitions
2. Objectives of good management
3. Management systems and their comparative effectiveness
4. Management responsibilities
5. Effective management tools
6. Guidelines for proper scheduling and forecasting
7. General rules for scheduling personnel
8. Develop a job description for a waiter/waitress
9. Schedule waiters/waitresses for a given restaurant operation

Related Information: What the Student Should Know

Application: What the Student Should Be Able to Do

Unit 3: Cost Controls

1. Terms and definitions
2. Basic types of costs
3. Other types of costs
4. Factors affecting food costs
5. Guidelines for effective cost control
6. Factors included in the cost of a meal
7. Determining menu price
8. Requirements for effective purchasing control
9. Factors affecting good storage control
10. Factors affecting labor costs
11. Ways to reduce labor costs
12. Determine the cost per portion of given recipes
13. Identify purchasing control problems
14. Identify storage control problems
15. Solve problems concerning ways to reduce labor costs

Unit 4: Keeping Records

1. Common records in a food service operation
2. Good record keeping habits
3. Characteristics of a production schedule
4. Requirements of a production schedule
5. Requirements of a meal census
6. Requirements of a cash report
7. Items of information needed for a special meal function sheet

Related Information: What the Student Should Know

8. Characteristics of a food cost summary
9. Requirements of a food cost summary
10. Requirements of a labor cost summary
11. Steps for figuring profit and loss

Application: What the Student Should Be Able to Do

12. Complete meal census for one week
13. Complete daily and weekly cash reports
14. Complete a food cost summary
15. Calculate labor costs
16. Complete a labor cost summary
17. Complete a profit/loss summary

Unit 5: Purchasing and Receiving

1. Terms and definitions
2. Techniques for working with salespeople
3. Basic methods of purchasing
4. Optional methods of purchasing
5. Steps in purchasing
6. Quality standards
7. Recommended information for food labels
8. Functions of specifications
9. Functions of USDA grading
10. First rules of receiving
11. Steps in receiving
12. Guidelines for receiving fresh produce
13. Guidelines for receiving frozen foods
14. Guidelines for receiving poultry
15. Guidelines for receiving meats
16. Guidelines for receiving pastries
17. Guidelines for receiving dairy products

18. Complete a purchasing chart to show amounts to order
19. Complete a purchasing chart to show amounts needed
20. Complete a food purchase checklist
21. Complete a food receiving checklist
22. Write specifications for a canned food, a fresh food, and a frozen food

Unit 6: Storing and Issuing

Related Information: What the Student Should Know

1. Terms and definitions
2. Categories of storage
3. Dry storage practices and procedures
4. Refrigerated storage practices and procedures
5. Recommended refrigerated storage maximums
6. Frozen storage practices and procedures
7. Maximum frozen storage periods
8. Procedures for storage control
9. Reasons for keeping good inventories
10. Procedures for controlling inventories
11. Essential steps in taking an inventory
12. Inventory information requirements
13. Guidelines for issuing
14. Guidelines for security control

Application: What the Student Should Be Able to Do

15. Identify proper storage areas for given foods and nonfood items
16. Prepare storeroom requisitions
17. Complete a physical inventory
18. Complete a food service security checklist

Unit 7: Personnel Management

1. Terms and definitions
2. Means of locating new employees
3. Characteristics of an application form
4. Purposes of an interview

Related Information: What the Student Should Know

5. Steps in preparing for an interview
6. Tips on interviewing
7. Items included in employee orientation
8. Methods for training new employees
9. Basic guidelines for a good training program
10. Steps in the four step training method
11. Advantages of a good training program to management
12. Advantages of a good training program to employees
13. Techniques for giving instructions
14. Factors to consider for effective delegation
15. Reasons for performance appraisals
16. Procedure for administering performance appraisals
17. Methods of handling disciplinary problems
18. Factors to consider when terminating an unsatisfactory employee

Application: What the Student Should Be Able to Do

19. Write a classified ad
20. Write interview questions
21. Conduct an interview
22. Train an employee using the four step training method
23. Complete a questionnaire on the effectiveness of a performance appraisal system

Unit 8: Human Relations

1. Terms and definitions
2. Goals of management regarding human relations
3. Ways to recognize a good employee
4. Procedure for initiating change

Related Information: What the Student Should Know

5. Techniques for encouraging cooperation
6. Ways to deal with employee problems
7. Guidelines for listening improvement

Application: What the Student Should Be Able to Do

8. Solve problems concerning initiating change in the work environment
9. Solve problems concerning techniques for encouraging cooperation
10. Solve problems concerning ways to deal with employee problems

Related Academic and Workplace Skills
For *Food Production, Management, and Services: Management*

Task	Skill Group	Sub Skill	Description
Unit 1: Orientation			
Complete and discuss a personal management potential survey (A.S. 1)	Foundation Skills	Writing	Presents conclusions in a clear and understandable form
	Personal Management Skills	Self-esteem and Personal and Career Development	Analyzes own personality characteristics
	Influence Skills	Organizational Effectiveness	Identifies characteristics desired by organization
Complete a checklist on what is most important to you in a job (A.S. 2)	Foundation Skills	Writing	Completes form accurately
	Adaptability Skills	Creative Thinking	Forms opinions
	Personal Management Skills	Self-esteem, Motivation/Goal Setting, and Personal and Career Development	Analyzes self; determines career goals
Construct a personal career ladder (A.S. 3)	Foundation Skills	Reading	Uses written resources in library to obtain factual information
		Writing	Takes notes from various sources
	Personal Management Skills	Motivation/Goal Setting and Personal and Career Development	Sets career goals; develops career plan
Unit 2: Tools and Functions of Management			
Develop a job description for a waiter/waitress (A.S. 1)	Foundation Skills	Reading	Uses written resources in library to obtain factual information
		Writing	Takes notes from various sources; organizes information into an appropriate format
Schedule waiters/waitresses for a given restaurant operation (A.S. 2)	Foundation Skills	Reading	Follows written directions; understands table to obtain information; applies information to given situation
		Math	Applies principles of division to work situation; interprets given table of data

Task	Skill Group	Sub Skill	Description
Unit 3: Cost Controls			
Determine the cost per portion of given recipes (A.S. 1)	Foundation Skills	Math	Interprets data; applies principles of addition and division to work situation
Identify purchasing control problems (A.S. 2)	Foundation Skills	Reading	Draws conclusions from what is read; applies information to new situations
		Writing	Presents conclusions in a clear and understandable form
	Adaptability Skills	Problem Solving	Recognizes problems
Identify storage control problems (A.S. 3)	Foundation Skills	Reading	Applies information to new situations; draws conclusions from what is read
		Writing	Presents conclusions in a clear and understandable form
	Adaptability Skills	Problem Solving	Recognizes problems and gives solutions
Solve problems concerning ways to reduce labor costs (A.S. 4)	Foundation Skills	Reading	Applies information to new situations; draws conclusions from what is read
		Writing	Presents conclusions in a clear and understandable form
	Adaptability Skills	Problem Solving	Recognizes problems and gives solutions
Unit 4: Keeping Records			
Complete meal census for one week (A.S. 1)	Foundation Skills	Math	Applies principles of addition to work situations; interprets given table of data
Complete daily and weekly cash reports (A.S. 2)	Foundation Skills	Math	Applies principles of addition and subtraction to work situations; interprets given table of data
Complete a food cost summary (A.S. 3)	Foundation Skills	Math	Applies principles of addition, subtraction, and multiplication to work situations; calculates percentages
Calculate labor costs (A.S. 4)	Foundation Skills	Math	Applies principles of addition and multiplication to work situations; interprets given charts of work schedules
Complete a labor cost summary (A.S. 5)	Foundation Skills	Math	Applies principles of addition, multiplication, and division to work situation; obtains correct information from previous charts; calculates percentages

Task	Skill Group	Sub Skill	Description
Complete a profit/loss statement (A.S. 6)	Foundation Skills	Math	Applies principles of addition, subtraction, multiplication, and *division to work situation;* obtains correct information from previous charts; calculates percentages
Unit 5: Purchasing and Receiving			
Complete a purchasing chart to show amounts to order (A.S. 1)	Foundation Skills	Math	Interprets data; applies principles of addition and subtraction to work situation
Complete a purchasing chart to show amounts needed (A.S. 2)	Foundation Skills	Math	Interprets data; applies principles of subtraction to work situation
Complete a food purchase checklist (A.S. 3)	Foundation Skills	Writing	Records data through observation; completes form accurately; summarizes information and observations in clear and logical sentences
	Communication Skills	Listening	Listens for content
		Oral Communication	Speaks clearly and effectively; asks questions to clarify information
	Group Effectiveness Skills	Interpersonal Relations	Applies human relations skills to real life situation; shows initiative and courtesy in meeting and working with employees
Complete a food receiving checklist (A.S. 4)	Foundation Skills	Writing	Records data through observation; completes form accurately; summarizes information and observations in clear and logical sentences
	Communication Skills	Listening	Listens for content
		Oral Communication	Speaks clearly and effectively; asks questions to clarify information
	Group Effectiveness Skills	Interpersonal Relations	Applies human relations skills to real life situation; shows initiative and courtesy in meeting and working with employees
Write specifications for a canned food, a fresh food, and a frozen food (A.S. 5)	Foundation Skills	Reading	Applies guidelines to new problems; determines what information is needed
		Writing	Uses technical words; organizes information into an appropriate format

Task	Skill Group	Sub Skill	Description
Unit 6: Storing and Issuing			
Identify proper storage areas for given foods and nonfood items (A.S. 1)	Foundation Skills	Reading	Applies information to new situations
Prepare storeroom requisitions (A.S. 2)	Foundation Skills	Math	Applies principles of addition and multiplication to work situation; calculates and converts different units of measurement
Complete a physical inventory (A.S. 3)	Foundation Skills	Writing	Records data through observation; completes form accurately
	Communication Skills	Oral Communication	Speaks clearly and effectively; asks questions to clarify information
	Group Effectiveness Skills	Interpersonal Relations	Applies human relations skills to real life situation; shows initiative and courtesy in meeting and working with employees
Complete a food service security checklist (A.S. 4)	Foundation Skills	Reading	Applies information to new situations
		Writing	Completes form accurately; summarizes information in clear and logical sentences
Unit 7: Personnel Management			
Write a classified ad (A.S. 1)	Foundation Skills	Reading	Applies guidelines and example to new problem; determines what information is needed in ad
		Writing	Uses technical words; organizes information into an appropriate format
Write interview questions (A.S. 2)	Foundation Skills	Reading	Applies guidelines and examples to new problem; determines questions that are appropriate
		Writing	Writes logical and appropriate questions
Conduct an interview (A.S. 3)	Foundation Skills	Writing	Summarizes applicant's answers
	Communication Skills	Listening	Listens for content and emotional meaning; shows interest nonverbally

Task	Skill Group	Sub Skill	Description
		Oral Communication	Speaks clearly and effectively using appropriate eye contact, gestures, and posture; interprets nonverbal cues of applicant; asks questions and follow-up questions
	Group Effectiveness Skills	Interpersonal Relations	Maintains positive relation with applicant; applies human relations skills to role play situation
Train an employee using the four step training method (A.S. 4)	Foundation Skills	Writing	Organizes information into an appropriate format
	Communication Skills	Oral Communication	Speaks clearly; explains process effectively; asks and answers questions; adapts presentation to audience
		Listening	Listens for content
	Group Effectiveness Skills	Interpersonal Relations	Applies human relations skills to role play situation; shows courtesy in working with employee
	Influence Skills	Leadership	Directs individual in performance of a specific task
Complete a questionnaire on the effectiveness of a performance appraisal system (A.S. 5)	Foundation Skills	Writing	Writes logical and understandable sentences; summarizes information; takes notes from various sources
	Communication Skills	Oral Communication	Speaks effectively; asks questions to clarify information
		Listening	Listens for content
	Group Effectiveness Skills	Interpersonal Relations	Applies human relations skills to real life situation; shows initiative and courtesy in meeting and working with manager
	Influence Skills	Organizational Effectiveness	Summarizes evaluation system used in food service

Unit 8: Human Relations

Task	Skill Group	Sub Skill	Description
Solve problems concerning initiating change in the work environment (A.S. 1)	Foundation Skills	Reading	Comprehends written information for main ideas; recalls important details from written information; draws conclusions from what is read
		Writing	Writes logical and understandable sentences; summarizes written information

Task	Skill Group	Sub Skill	Description
	Adaptability Skills	Problem Solving	Recognizes problems and gives solutions
Solve problems concerning techniques for encouraging cooperation (A.S. 2)	Foundation Skills	Reading	Comprehends written information for main ideas; recalls important details from written information; draws conclusions from what is read
		Writing	Writes logical and understandable sentences; summarizes written information
	Adaptability Skills	Problem Solving	Recognizes problems and gives solutions
Solve problems concerning ways to deal with employee problems (A.S. 3)	Foundation Skills	Reading	Comprehends written information for main ideas; recalls important details from written information; draws conclusions from what is read
		Writing	Writes logical and understandable sentences; summarizes written information
	Adaptability Skills	Problem Solving	Recognizes problems and gives solutions

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Stokes, John. *How to Manage a Restaurant or Institutional Food Service*, 4th ed. Dubuque, IA: Wm. C. Brown Co., 1982.

Glossary

Application form — Selection tool used to obtain information about an applicant

Commodity — A product of agriculture

Communication — Process by which information is exchanged between individuals in a manner in which it can be easily understood

Constructive criticism — Evaluation of a person's performance that includes suggestions for improvement and development

Cost of recipe — Cost of all ingredients that make up a food item in a recipe

Credit memo — Written form used by receiving department to notify purveyor when merchandise is returned, when an order is short by weight or count, or when prices are incorrect and a credit needs to be issued

Decision making — Process of choosing a course of action to solve a specific problem

Delegate — To assign a task to a particular individual

Discipline — To correct an employee's conduct according to the established rules and regulations of an organization

Discriminate — To treat individuals differently on any basis other than individual merit

Empathy — To understand and be sensitive to the feelings of others

Extension price — Price of the amount used in a recipe

Fair employment practice — Procedure used to allow all applicants an equal chance at a job; helps to prevent discrimination

FDA — Food and Drug Administration; governing agency covering production, manufacture, and distribution of food involved in interstate commerce

Feedback — Information returned to the source that helps to evaluate an action or process

FIFO — First in, first out; used as a guideline to assure that foods will be used in proper order

Hire — To engage the services of an individual

Human relations — A study of human problems designed to develop better interpersonal relationships

Interview — To evaluate the qualifications of an individual for a specific job by asking questions about the personal and work history of the applicant

Inventory — A record of all goods on hand

Invoice — An itemized statement of goods purchased and their costs

Local market — Type of market that receives, stores, and distributes products from secondary markets to local and area users

Manager — Individual who directs and controls an operation

Market price — Price paid for a market unit

Market unit — Size of an item as it is purchased

Markup — Difference between the selling price and the market price

Menu price — Price charged customer

Morale — Employee's attitude toward the organization with respect to confidence, enthusiasm, and willingness to work

Motion economy — Reduction in actual physical motions required to do a job so that the job can be done faster at an acceptable performance level

Motivation — An inner drive that inspires a person to work toward a goal

Negative public — People who respond unfavorably to a company's products or services

Orientation — To acquaint new employees with surroundings and policies of an organization

Performance appraisal (evaluation) — Method of measuring an employee's work through established standards as set by management

Perishables — Foods susceptible to invasion by bacteria, molds, yeasts, and spoilage unless correctly stored

Per portion cost — Cost of each serving

Personality — The sum of all specific traits that are consistently observable in an individual's behavior

Personnel management — Management of people as people

Piece-work — A production system that pays workers on a basis of quantity completed

Pilferage — Stealing, especially in small quantities over and over again

Positive public — People who respond favorably to a company's products or services

Positive reinforcement — Anything that rewards a person for a job well done

Primary market — Type of market that processes basic commodities in centralized locations and sets prices based on supply and demand

Profit — Excess of the selling price of menu items over their cost

Purchase order — Written request for goods which lists item specifications such as type, quantity, quality, and date needed

Purveyor — A company or person that sells and delivers supplies at a marked up price

Recruitment — To increase or maintain the number of employees in an organization

Requisition — A written request for supplies to be obtained from storage

Secondary market — Type of market that serves as a centralized distribution center

Self esteem — A good opinion of one's self

Shelf life — Maximum time that perishables can be stored under refrigeration

Specifications — A detailed description of a food product by grade, size, type, and quality required by a given food operation

Staples — Basic food items that keep indefinitely without refrigeration

Supervise — To oversee, direct, or manage the work of others

Task — A job to be performed

Training program — Method of providing employees with ideas and knowledge of the job and skills and to improve individual work habits

Trait — A distinguishing quality or characteristic that contributes to personality

USDA — United States Department of Agriculture

Work environment — Physical conditions present in the work area

***Permission to duplicate this glossary is granted.**

Orientation
Unit 1

Objective Sheet

Unit Objective

After completing this unit, the student should be able to complete and discuss a personal management potential survey and construct a personal career ladder. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Match terms related to food service management with their correct definitions.
2. Complete statements concerning job opportunities in food service management.
3. Select benefits of a management position.
4. List hardships posed by a management position.
5. Match basic skills with their uses in food service management.
6. Match successful management qualifications with their definitions.
7. List types of people food service management attracts.
8. Complete statements concerning traditional ways to become a food service manager.
9. Select true statements concerning tips for improving managerial potential.
10. Complete and discuss a personal management potential survey. (Assignment Sheet 1)
11. Complete a checklist on what is most important to you in a job. (Assignment Sheet 2)
12. Construct a personal career ladder. (Assignment Sheet 3)

Orientation
Unit 1

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.
2. Review Teaching Suggestions section that follows. Plan for classroom activities.
3. Plan for enrichment of exceptional students as well as accommodation of special needs students.
4. Make transparencies from the transparency masters included with this unit. These appear in the teacher guide only and are designed to be used with the following objectives:

   TM 1—Projected Employment Increases in Restaurant Industry
   TM 2—Typical Career Ladders
5. Obtain films, videotapes, and other resources to supplement instruction of this unit. See ordering information in the Suggested Supplemental Resources section that follows.
6. Develop teaching plan. Adjust for different learning styles.
7. Make copies of Unit Evaluation Form.

Delivery and Application

8. Provide students with unit of instruction.
9. Discuss unit and specific objectives.
10. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.
11. Discuss the assignment sheets. Review criteria for evaluation of these activities.

Evaluation

12. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.

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Suggested Activities

13. Make copies of the written test.

14. Give written test.

15. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.

16. Reteach and retest as required.

Teaching Suggestions

Note: Skill area appearing in bold face type in the Teaching Suggestions refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Invite a manager of a local or area restaurant to talk to the class about management qualifications in large restaurant operations, salaries, and the need for managers in the future. (**Communication skills, personal and career development**)

2. Invite a manager of a local or area fast food operation to talk to the class about management qualifications in fast food operations, salaries, and future employment potential for managers. (**Communication skills, personal and career development**)

3. Have students compare management opportunities between large restaurant operations and fast food operations based on information obtained during guest speaker presentations. This may be in a group discussion or assigned as a written activity. (**Creative thinking, communication skills, and personal and career development**)

4. Review with class Unit 1 in MAVCC's *Food Production, Management, and Services: Introduction* for additional career information. (**Personal and career development**)

5. Retain copies of students' career ladders to send to them after they have been in a related food service job for a year. Ask for feedback on their progress in attaining the goals set in their career ladders. (**Motivation/goal setting and personal and career development**)

6. Assign students to teams of 2 or 3 and have them research a hardship posed by a management position. As part of their research, have them come to a conclusion about possible solutions or ways to deal with the problem. Give students an opportunity to share information with each other. (**Reading, communication skills, problem solving, teamwork**)

Suggested Activities

Resources Used in Developing This Unit

1. Brymer, Robert. *Introduction to Hotel and Restaurant Management*, 5th ed. Dubuque, IA: Kendall-Hunt Publishing Co., 1987.

2. *Encyclopedia of Careers and Vocational Guidance*, 4 Volumes. Chicago: J. G. Ferguson Publishing Co., 1990.

3. Knoll, Anne. *Food Service Management: A Human Relations Approach.* New York: McGraw-Hill Book Co., 1975.

4. *Occupational Outlook Handbook.* Washington, D.C.: U.S. Department of Labor, Bureau of Labor Statistics, April 1990.

5. Palan, Earl. *Food Production, Management, and Services: Introduction*, 2nd ed. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1992.

6. Powers, Tom. *Introduction to Management in the Hospitality Industry*, 3rd ed. New York: John Wiley and Sons, 1988.

Suggested Supplemental Resources

Note: The National Restaurant Association (NRA) has a variety of books dealing with food service management. To obtain a catalog of publications, write the National Restaurant Association, 1200 Seventeenth Street, N.W., Washington, D.C. 20039-3097, or call 1-800-424-5156.

NRA Publications

1. *Foodservice Employment 2000*, 1989.

2. *Benefits for Hourly Employees in Foodservice*, 1990.

3. *Wages and Benefits for Salaried Employees and Executives in the Foodservice Industry*, 1988.

4. *1991 National Restaurant Association Foodservice Industry Forecast*, 1990.

Orientation
Unit 1

Answers to Written Test

1. a. 2
   b. 3
   c. 5
   d. 1

2. a. Increase
   b. Five
   c. Higher
   d. Capital
   e. More
   f. One-half

3. a, c, d, f

4. Any four of the following:

   a. Long hours
   b. Irregular working hours including nights, weekends, and holidays
   c. Increased pressures and resulting stress
   d. Dealing with temporary and often unqualified workers
   e. Exposure to a negative public

5. a. 3
   b. 5
   c. 1
   d. 2

6. a. 4
   b. 2
   c. 5
   d. 1
   e. 3

Answers to Written Test

7. Any five of the following:

   a. People with good personal work experience
   b. People with family backgrounds in the food industry
   c. People who enjoy working with people
   d. People who enjoy working with food
   e. People who enjoy dining out themselves
   f. People with an interest in traveling and meeting other people
   g. People with a realistic desire to operate their own business and be independent

8. a, b, c, e

9. b, c, e, f, g

Orientation
Unit 1

Written Test

Name ______________________________ Score ______________

1. Match the terms on the right with their correct definitions.

_____a. The sum of all specific traits that are consistently observable in an individual's behavior

_____b. People who respond unfavorably to a company's products or services

_____c. Individual who directs and controls an operation

_____d. A distinguishing quality or characteristic that contributes to personality

1. Trait
2. Personality
3. Negative public
4. Positive public
5. Manager

2. Complete the following statements concerning job opportunities in food service management by circling the correct words.

a. Employment in the restaurant industry is expected to (increase, decrease) faster than the average for all industries through the 1990s.

b. One out of every (two, five) jobs in the restaurant industry is a managerial position.

c. Pay scale for all management positions is significantly (lower, higher) than for other workers in the field.

d. Management skills pave the way for ownership, partnership, or group ownership when adequate (capital, desire) is available.

e. Food service industry employs (more, fewer) minority managers than any other industry.

f. Women hold (one-quarter, one-half) of the jobs in food service management and administration.

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Written Test

3. Select benefits of a management position by placing an "X" in the appropriate blanks.

______a. Self-fulfillment

______b. Average pay

______c. Gratification of exercising authority

______d. Exposure to a positive public

______e. Not having to assume any responsibility

______f. Group life and medical insurance, paid vacations, and other incentives

______g. Increased opportunity for same jobs in some geographical locations

4. List four hardships posed by a management position.

a. ____

b. ____

c. ____

d. ____

5. Match the basic skills on the right with the correct uses in food service management.

______a. Managers must be able to read and understand forms, reports, and a variety of other written communications.

______b. Managers must be able to use legible handwriting for preparing messages and keeping records.

______c. Managers must be able to perform simple to complex math by hand or on a calculator.

______d. Managers must be able to listen attentively to directions so that they will be fully understood.

1. Arithmetic
2. Listening
3. Reading
4. Speaking
5. Writing

Written Test

6. Match successful management qualifications on the right with their correct definitions.

______a. The ability to make timely and wise decisions

______b. The habits of honesty and sincerity

______c. A faithful dedication to duty, to supervisors, and to the firm for which one works

______d. The ability to take positive action in making difficult decisions

______e. The flair for developing new ideas that improve quality, productivity, and service

1. Courage
2. Integrity
3. Creativity
4. Judgement
5. Loyalty

7. List five types of people food service management attracts.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

8. Select traditional ways to become a food service manager by placing an "X" next to the correct ways.

______a. Hard work and advancement within a restaurant staff

______b. Company management training programs

______c. Formal training in hotel, restaurant, or institutional management at vocational-technical school, junior college, or four-year college or university

______d. Walking in off the street and taking over

______e. Participation in or continuation of family business

Written Test

9. Select true statements concerning tips for improving managerial potential by placing an "X" in the appropriate blanks.

_______a. Learn as little as you can about the many different jobs and processes in the industry.

_______b. Take summer or part-time jobs that keep you in touch with the industry.

_______c. Develop good work habits such as keeping yourself neat and clean and getting to work on time.

_______d. Observe guests at the restaurants where you dine and keep notes of the fashions that most impress you.

_______e. Read industry magazines to keep up with changes and new ideas.

_______f. Keep notes on the restaurants that impress you most, and compare the atmosphere, food, and service to see how they are alike or different.

_______g. Remember that managers are products of experience and training and that they have had to work their way up a career ladder to merit management positions.

*Permission to duplicate this test is granted.

Orientation
Unit 1

Unit Evaluation Form

Student Name ______________________ Unit Rating ________

Assignment Sheet 1—Complete and Discuss a Personal Management Potential Survey Rating ______

Comments: ______________________

____

Assignment Sheet 2—Complete a Checklist on What is Most Important To You in a Job Rating ______

Comments: ______________________

____

Assignment Sheet 3—Construct a Personal Career Ladder Rating ______

Comments: ______________________

____

Written Test Scores

Pretest ______ Posttest ______ Other ______

Other ______________________

____

Teacher Signature ______________________ Date ________

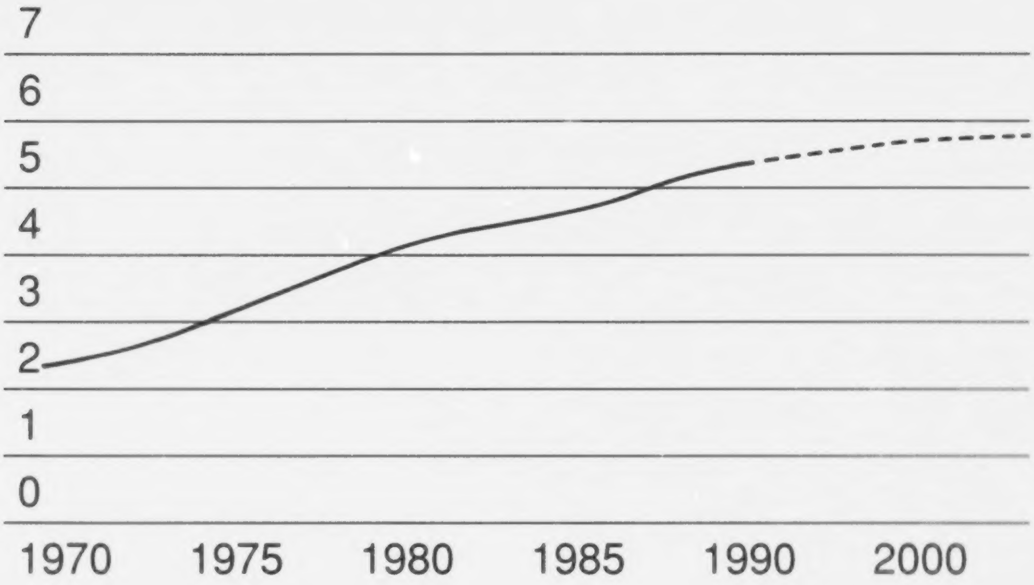
Student Signature ______________________ Date ________

***Permission to duplicate this form is granted.**

Projected Employment Increases in Restaurant Industry

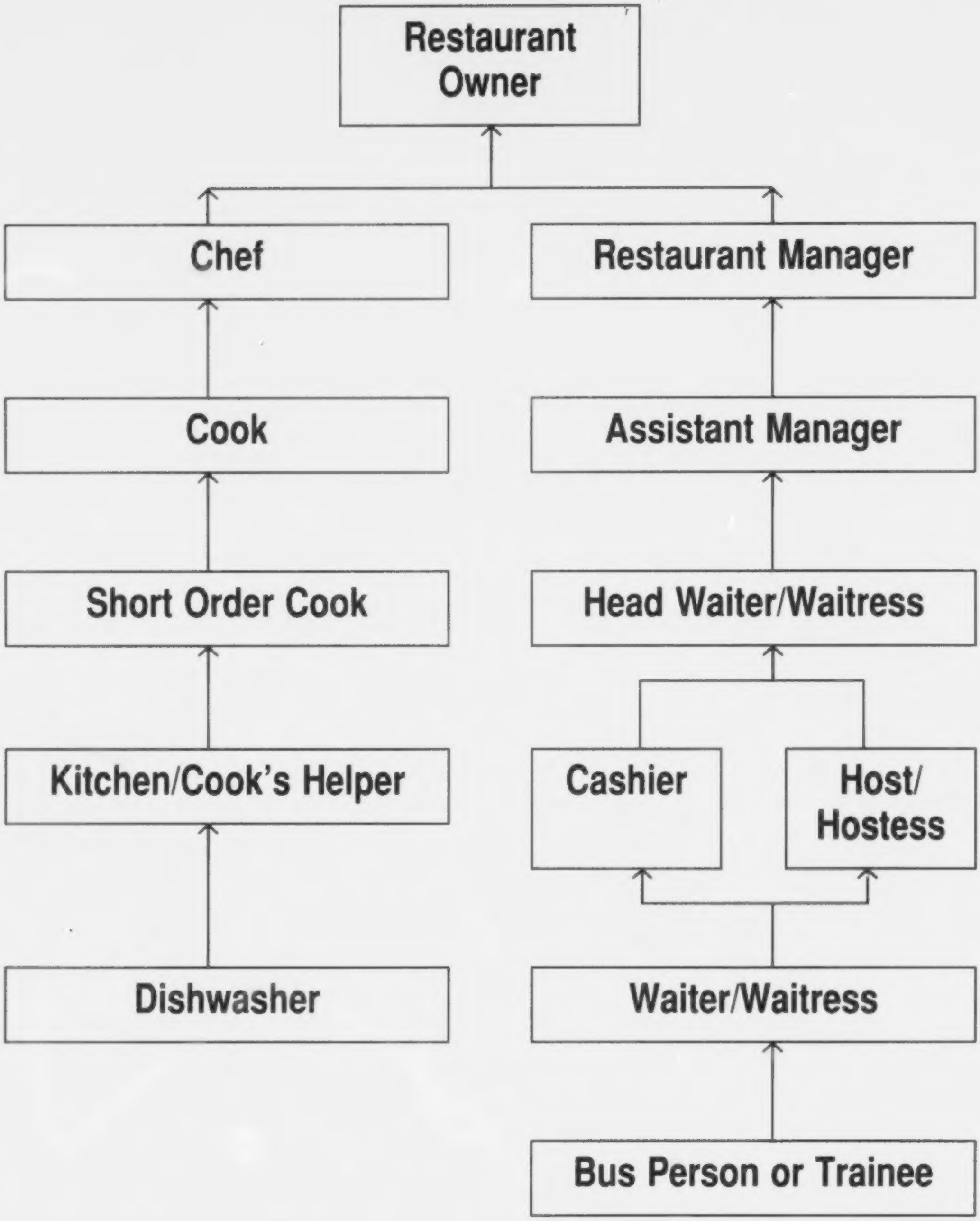
As more people eat out more often, employment in the restaurant industry will increase rapidly.

Restaurant workers (millions)



Source: Bureau of Labor Statistics

Typical Career Ladders


Restaurant Owner
Chef
Restaurant Manager
Cook
Assistant Manager
Short Order Cook
Head Waiter/Waitress
Kitchen/Cook's Helper
Cashier
Host/ Hostess
Dishwasher
Waiter/Waitress
Bus Person or Trainee

Orientation
Unit 1

Information Sheet

1. **Terms and definitions**

   a. **Manager** — Individual who directs and controls an operation

   b. **Negative public** — People who respond unfavorably to a company's products or services

   c. **Personality** — The sum of all specific traits that are consistently observable in an individual's behavior

   d. **Positive public** — People who respond favorably to a company's products or services

   e. **Trait** — A distinguishing quality or characteristic that contributes to personality

2. **Job opportunities in food service management**

   a. Employment in the restaurant industry is expected to increase faster than the average for all industries through the 1990s.

   b. One out of every five jobs in the restaurant industry is a managerial position.

   c. Pay scale for all management positions is significantly higher than for other workers in the field.

   d. Management skills pave the way for ownership, partnership, or group ownership when adequate capital is available.

   e. Food service industry employs more minority managers than any other industry.

   f. Women hold half the jobs in food service management and administration.

3. **Benefits of a management position**

   a. Better pay

   b. Self-fulfillment

   c. Gratification of exercising authority

   d. Challenge of assuming responsibility

   e. Exposure to a positive public

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Information Sheet

f. Group life and medical insurance, paid vacations, and other incentives

Note: Benefits vary from company to company. Generally, the higher the management level, the better the benefits, some of which may include low-interest loans and stock purchase plans.

g. Increased opportunity for better jobs in many geographical locations

h. Increased opportunity for lateral movement to a better job within a company

4. **Hardships posed by a management position**

a. Long hours

b. Irregular working hours including nights, weekends, and holidays

c. Increased pressures and resulting stress

d. Dealing with temporary and often unqualified workers

e. Exposure to a negative public

5. **Basic skills and their uses in food service management**

a. **Reading** — Managers must be able to read and understand forms, reports, and a variety of other written communications.

b. **Writing** — Managers must be able to use legible handwriting for preparing messages and keeping records.

c. **Arithmetic** — Managers must be able to perform simple to complex math by hand or on a calculator.

d. **Listening** — Managers must be able to listen attentively to directions so that they will be fully understood.

e. **Speaking** — Managers must be able to speak clearly so that verbal communications will be understood completely.

6. **Successful management qualifications and their definitions**

a. **Judgement** — The ability to make timely and wise decisions

b. **Integrity** — The habits of honesty and sincerity

c. **Loyalty** — A faithful dedication to duty, to supervisors, and to the firm for which one works

Information Sheet

- d. **Courage** — The ability to take positive action in making difficult decisions
- e. **Creativity** — The flair for developing new ideas that improve quality, productivity, and service

7. **Types of people food service management attracts**
   - a. People with good personal work experience
   - b. People with family backgrounds in the food industry
   - c. People who enjoy working with people
   - d. People who enjoy working with food
   - e. People who enjoy dining out themselves
   - f. People with an interest in traveling and meeting other people
   - g. People with a realistic desire to operate their own business and be independent

8. **Traditional ways to become a food service manager**
   - a. Hard work and advancement within a restaurant staff
   - b. Company management training programs
   - c. Formal training in hotel, restaurant, or institutional management at vocational-technical school, junior college, or four-year college or university
   - d. Participation in or continuation of family business

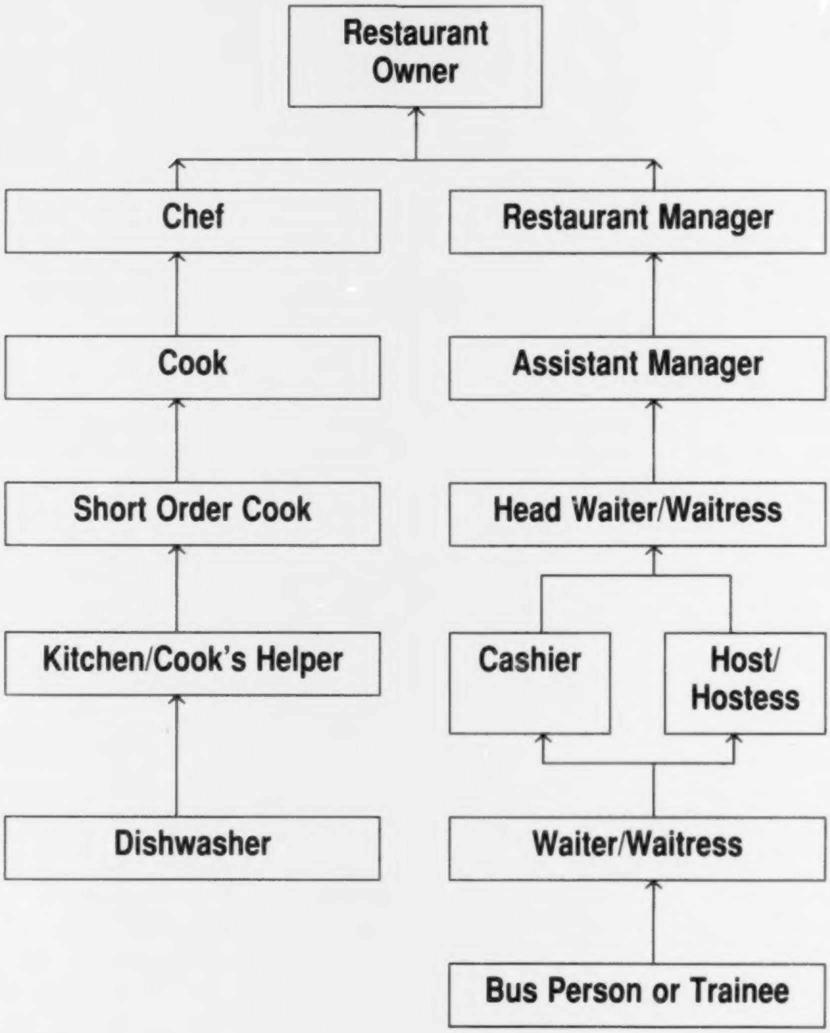
9. **Tips for improving managerial potential**
   - a. Learn all you can about the many different jobs and processes in the industry.
   - b. Take summer or part-time jobs that keep you in touch with the industry.
   - c. Develop good work habits such as keeping yourself neat and clean and getting to work on time.
   - d. Observe managers at the restaurants where you dine and keep notes of the attitudes and actions that most impress you.
   - e. Read industry magazines to keep up with changes and new ideas.

f. Talk with other restaurant employees about their jobs, their managers, and their general response to the industry.

g. Keep notes on the restaurants that impress you most, and compare the atmosphere, food, and service to see how they are alike or different.

h. Remember that managers are products of experience and training and that they have had to work their way up a career ladder to merit management positions.

Figure 1—Career ladder example


Restaurant Owner
Chef
Restaurant Manager
Cook
Assistant Manager
Short Order Cook
Head Waiter/Waitress
Kitchen/Cook's Helper
Cashier
Host/ Hostess
Dishwasher
Waiter/Waitress
Bus Person or Trainee

Orientation
Unit 1

Assignment Sheet 1—Complete and Discuss a Personal Management Potential Survey

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Personality described accurately	______
Paragraph is well written with appropriate traits identified	______

Directions: From the list below, check (✓) the words that best describe your personality in everyday activities.

Popular ( )
Independent ( )
Forgetful ( )
Honest ( )
Organized ( )
Loyal ( )
Dependable ( )
Decisive ( )

Cheerful ( )
Logical ( )
Understanding ( )
Creative ( )
Sensitive ( )
Moody ( )
Restless ( )
Responsible ( )

Worrier ( )
Inventive ( )
Enthusiastic ( )
Sincere ( )
Ambitious ( )
Dedicated ( )
Hard Working ( )
Good Communicator ( )

From the items checked above, select the three personality traits you feel would benefit you most as a restaurant manager, and explain your reasons in a short paragraph. Continue on the back.

____

____

____

____

Assignment Sheet 1

Orientation
Unit 1

Assignment Sheet 2—Complete a Checklist on What is Most Important to You in a Job

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Job aspects are checked as appropriate for student	______
Job aspects are ranked as appropriate for student	______

Directions: People have many different ideas about what is most important in a job. Look over the list below and check the column which best describes your opinion about each item. In the last column, rank the items from 1 (very important) to 16 (least important).

ASPECTS OF A JOB	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT AT ALL	I DON'T KNOW	RANK
High salary					
Enjoyable work					
Plenty of vacation					
Chance to help other people					
Regular working hours					
Chance to be promoted					
Job security					
Job duties spelled out clearly					
Friendly co-workers					

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Assignment Sheet 2

ASPECTS OF A JOB	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT AT ALL	I DON'T KNOW	RANK
Pleasant surroundings					
Good boss					
Chance to supervise other people					
Good health insurance and benefits					
Chance to continue education					
Variety of responsibilities					
Chance to be creative					

Orientation
Unit 1

Assignment Sheet 3—Construct a Personal Career Ladder

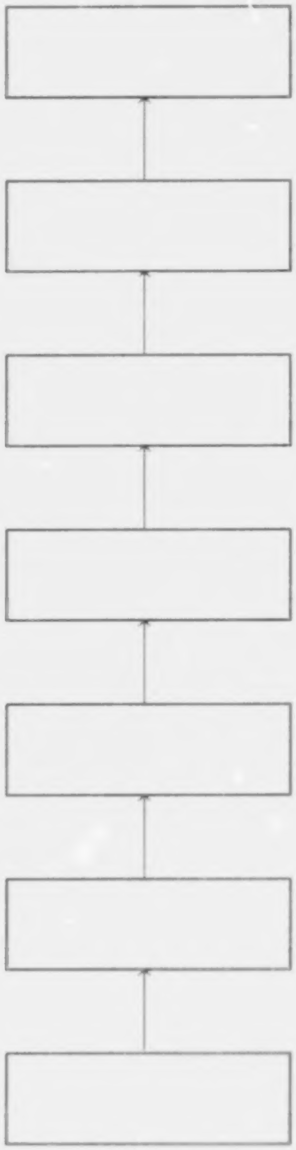
Name ____ Overall Rating __________

Evaluation criteria	Rating
Career ladder is appropriately drawn	______
Time employed and salaries are included	______

Directions: Study the typical career ladder in the information sheet, objective 9. Now construct a personal career ladder that reflects the route you would like to follow for your move into management. Use the back of this page or a separate sheet of paper. Indicate how many months or years you plan to be at various positions. Also give the approximate salaries that you can expect. Research salary information with your instructor or the *Occupational Outlook Handbook* in your library.

Assignment Sheet 3

Management Career Ladder for ______________________________
(name)



______________ (Salary) ______________ (Time Employed)

______________ (Salary) ______________ (Time Employed)

______________ (Salary) ______________ (Time Employed)

______________ (Salary) ______________ (Time Employed)

______________ (Salary) ______________ (Time Employed)

______________ (Salary) ______________ (Time Employed)

______________ (Salary) ______________ (Time Employed)

Tools and Functions of Management
Unit 2

Objective Sheet

Unit Objective

After completing this unit, the student should be able to develop a job description for a waiter/waitress and schedule them for a given restaurant operation. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Match terms related to tools and functions of management with their correct definitions.
2. Select objectives of good management.
3. Complete statements concerning management systems and their comparative effectiveness.
4. Match management responsibilities with their objectives.
5. Match effective management tools with their functions.
6. Select true statements concerning guidelines for proper scheduling and forecasting.
7. Complete statements concerning general rules for scheduling personnel.
8. Develop a job description for a waiter/waitress. (Assignment Sheet 1)
9. Schedule waiters/waitresses for a given restaurant operation. (Assignment Sheet 2)

Tools and Functions of Management
Unit 2

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.
2. Review Teaching Suggestions section that follows. Plan for classroom activities.
3. Plan for enrichment of exceptional students as well as accommodation of special needs students.
4. Make transparencies from the transparency masters included with this unit. These appear in the teacher guide only and are designed to be used with the following objectives:

   TM 1—Restaurant Organizational Chart (Objective 5)
   TM 2—Job Description (Objective 5)
   TM 3—Weekly Work Schedule (Objective 5)

5. Make copies of any of the transparency masters that you would like to distribute to students. There are small versions of these in the information sheet, but larger copies may be needed.
6. Obtain films, videotapes, and other resources to supplement instruction of this unit. See ordering information in the Suggested Supplemental Resources section that follows.
7. Develop teaching plan. Adjust for different learning styles.
8. Make copies of Unit Evaluation Form.

Delivery and Application

9. Provide students with unit of instruction.
10. Discuss unit and specific objectives.
11. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.
12. Discuss the assignment sheets. Review criteria for evaluation of these activities.

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Suggested Activities

Evaluation

13. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.

14. Make copies of the written test. Add or modify test questions as needed.

15. Give written test.

16. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.

17. Reteach and retest as required.

Teaching Suggestions

Note: Skill areas appearing in bold face type in the Teaching Suggestions refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Invite a manager of a family-operated restaurant and a manager of a fast food operation to talk to the class about the management systems they use in their operations. (**Communication skills**)

2. Invite a restaurant manager to talk to the class about the procedures for making work schedules and the problems encountered in scheduling. (**Communication skills**)

3. Show actual examples of various forms used by local food service managers such as organizational charts, job descriptions, work schedules, and work improvement plans or procedure sheets. (**Organizational effectiveness**)

4. Develop assignment sheets to familiarize the class with management responsibilities as listed in objective 5 of the information sheet.

5. Provide career information and MAVCC's *Food Production, Management, and Services: Service* for students to complete Assignment Sheet 1.

Suggested Activities

Resources Used in Developing This Unit

1. Brymer, Robert. *Introduction to Hotel and Restaurant Management*, 5th ed. Dubuque, IA: Kendall-Hunt Publishing Co., 1987.
2. Eshbach, Charles. *Food Service Management*, 3rd ed. New York: Van Nostrand Reinhold, 1983.
3. Knoll, Anne. *Food Service Management: A Human Relations Approach*. New York: McGraw-Hill Book Co., 1975.
4. Lundberg, Donald and James Armatas. *Management of People in Hotels, Restaurants, and Clubs*, 4th ed. Dubuque, IA: Wm. C. Brown Co., Inc., 1980.
5. Palan, Earl. *Food Production, Management, and Services: Service*, 2nd ed. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1992.
6. Powers, Tom. *Introduction to Management in the Hospitality Industry*, 3rd ed. New York: John Wiley and Sons, 1988.

Suggested Supplemental Resources

Books available from:

National Restaurant Association
1200 Seventeenth Street, N.W.
Washington, D.C. 20039-3097

1. *A Primer on How to Recruit, Hire, and Retain Employees* (CS986)
2. *Building Excellence: Selecting, Motivating, and Retaining a Professional Foodservice Staff* (MG865)
3. *Professional Foodservice Management Through Job Analysis, Description, and Specifications*, Part 1 of 9-part series (MG684)
4. *Professional Foodservice Management Through Recruitment and Selection of Employees*, Part 9 of 9-part series (MG780)

Tools and Functions of Management
Unit 2

Answers to Assignment Sheets

Assignment Sheet 1 — Evaluated according to stated criteria.

Assignment Sheet 2

Meals Served Per Shift	Shift Hours	# of Hours Per Shift	Ave. # of Patrons Per Hour	Waiters/ Waitresses Required
150	6 a.m. - 11 a.m.	5	30	2
450	11 a.m. - 4 p.m.			1
	11 a.m. - 2 p.m.	3	150	8
510	4 p.m. - 10 p.m.	6	85	5

Tools and Functions of Management
Unit 2

Answers to Written Test

1. a. 3
   b. 6
   c. 5
   d. 2
   e. 1

2. b, c, d, f, g

3. a. Paternalistic
   b. Surpassing quotas
   c. Not always right
   d. Most used
   e. Workers

4. a. 4 e. 6
   b. 9 f. 8
   c. 7 g. 5
   d. 2 h. 1

5. a. 3
   b. 4
   c. 1
   d. 2

6. All are true

7. a. Yearly
   b. Workload
   c. Irregular
   d. Split
   e. Special events
   f. Supervisor
   g. Do

Tools and Functions of Management
Unit 2

Written Test

Name ______________________________ Score ______________

1. Match the terms on the right with their correct definitions.

   ______a. A job to be performed

   ______b. A production system that pays workers on a basis of quantity completed

   ______c. An inner drive that inspires a person to work toward a goal

   ______d. Anything that rewards a person for a job well done

   ______e. A good opinion of one's self

   1. Self-esteem
   2. Positive reinforcement
   3. Task
   4. Motion economy
   5. Motivation
   6. Piece-work

2. Select from the following list the correct objectives of good management by placing an "X" in the appropriate blanks.

   ______a. Recruit and train the worst personnel available.

   ______b. Set and maintain standards of conduct and operation through use of employee manuals, employee evaluations, and job descriptions.

   ______c. Motivate and reward dedicated service.

   ______d. Promote the organizational image.

   ______e. Show employees and owner how important and smart the manager is.

   ______f. Develop a management system that best meets the needs and objectives of the organization.

   ______g. Show a profit.

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Written Test

3. Complete the following statements concerning management systems and their comparative effectiveness by filling in the blanks with the correct words.

   a. In the ____________________ system, everyone is part of one big, happy family.

   b. In the scientific system, the motivation is a bonus for ____________________ ____________________.

   c. The effectiveness of the authoritative system is bad because the boss is ________________ ________________ ________________.

   d. The effectiveness of the participative system is excellent. It is the ____________________ ____________________ management system in food service.

   e. In the participative system, ____________________ share planning functions with management.

4. Match management responsibilities on the right with their objectives.

   _____a. Setting goals, then thinking through the activities needed to achieve those goals

   _____b. Reducing general activities to specific tasks, and assigning tasks to take best advantage of workers' abilities

   _____c. Selecting people with skills that can best accomplish required tasks

   _____d. Assuring that events occur at the proper place and in a proper time frame so that the combination of timing and task will produce a harmonious performance

   _____e. Exercising authority to regulate performance so that company standards will be achieved and maintained.

   _____f. Weighing options and alternative courses of action to improve daily activity or handle emergencies

   _____g. Assessing future circumstances or events in light of their impact on the performance of the organization

   _____h. Assigning a sufficient number of people to meet anticipated workloads

   1. Scheduling
   2. Directing
   3. Training
   4. Planning
   5. Forecasting
   6. Controlling
   7. Staffing
   8. Decision making
   9. Organizing
   10. Cross training

Written Test

5. Match effective management tools on the right with their functions.

_____a. List specific duties and other essential job information and help match the right person to the right job

_____b. Identify chain of command and make it easier for every employee to communicate needs or problems to a responsible person

_____c. Act as a major means of communication between employer and employees

_____d. Serve to assist individual employees in ways to increase speed through work simplification and motion economy

1. Work schedules
2. Work improvement plans
3. Job descriptions
4. Organizational charts

6. Select true statements concerning guidelines for proper scheduling and forecasting by placing an "X" in the appropriate blanks.

_____a. Daily peaks and valleys must be considered.

_____b. Weekly peaks and valleys must be considered.

_____c. Yearly peaks and valleys must be considered.

_____d. Forecasting for regional variations and special events must be considered.

7. Complete the following statements concerning general rules for scheduling personnel by circling the correct words.

a. Consider the daily, weekly, (monthly, yearly), or special workload.

b. Consider the workload and schedule enough people to properly handle it, but do not schedule people in hopes the (workload, employees) will be there.

c. Plan for (regular, irregular) weekly demands with irregular schedules so long as no one is overworked or unduly inconvenienced.

d. Plan for irregular daily demands with (swing, split) shifts.

e. Plan for regional variations or special events with (family help, part-time help).

f. Schedule at least one (owner, supervisor) per shift.

g. (Do, Do not) overlap schedules to allow for cleaning, food preparation, and peak hours.

***Permission to duplicate this test is granted.**

Tools and Functions of Management
Unit 2

Unit Evaluation Form

Student Name ______________________________ Unit Rating __________

Assignment Sheet 1—Develop a Job Description for a Waiter/Waitress Rating _____

Comments: ____

____

Assignment Sheet 2—Schedule Waiters/Waitresses for a Given Restaurant Operation Rating _____

Comments: ____

____

Written Test Scores

Pretest _____ Posttest _____ Other _____

Other ____

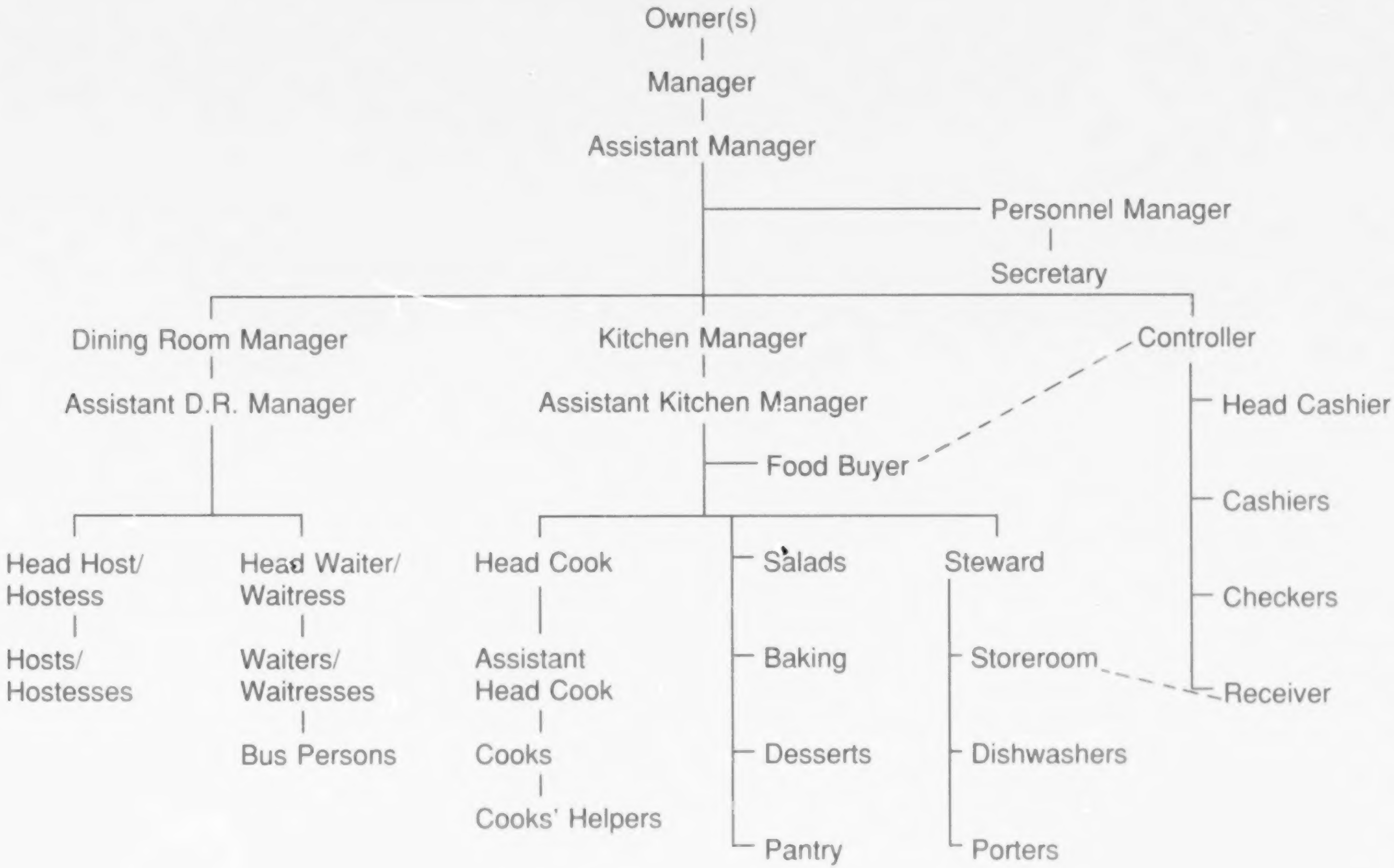
____

Teacher Signature ______________________________ Date __________

Student Signature ______________________________ Date __________

*Permission to duplicate this form is granted.

Restaurant Organizational Chart


Owner(s)
Manager
Assistant Manager
Personnel Manager
Secretary
Dining Room Manager
Assistant D.R. Manager
Head Host/ Hostess
Hosts/ Hostesses
Head Waiter/ Waitress
Waiters/ Waitresses
Bus Persons
Kitchen Manager
Assistant Kitchen Manager
Food Buyer
Head Cook
Assistant Head Cook
Cooks
Cooks' Helpers
Salads
Baking
Desserts
Pantry
Steward
Storeroom
Dishwashers
Porters
Controller
Head Cashier
Cashiers
Checkers
Receiver

Food Service: Management, Unit 2
Teacher Page 15

Job Description

Job Title: Food Service Manager

Job Summary:

Coordinates the food service activities of a restaurant or other similar such establishment.

General Requirements

- Prefer recent college graduate with four-year degree in hotel and restaurant administration; new employee will undergo management training up to one year. Will consider applicant with minimum of four years of successful performance in related position.
- Must have sufficient language proficiency to read and understand policies and procedures and to interpret them to the personnel supervised. Mathematical and clerical abilities are necessary to plan food program and calculate and record data pertinent to entire operation.
- Should be able to accept responsibility for direction, control, and planning of entire operation, and be able to make decisions.
- Needs even temperament to handle employees and to deal with the public.
- Should be able to demonstrate self-confidence, initiative, and dependability.

Physical Requirements:

Physical demands are classified as light. Work is performed inside, protected from the weather.

Work Performed

- Estimates the food and beverage amounts and costs.
- Keeps records of inventories, employees, and work schedules.
- Requisitions or purchases supplies.
- Consults with chef/cook and other personnel to plan the menus and related activities such as dining room, bar, and banquet operations.
- Inspects dining room, kitchen, and equipment for cleanliness.
- Interviews, hires, trains, and discharges employees.
- Investigates and resolves any food quality and service complaints.

Weekly Work Schedule

OPEN HOURS WEEK OF TO

	DAY	SUN		MON		TUES		WED		THUR		FRI		SAT		TOTAL
	DATE															
	PLANNED SALES $															
	ALLOWED HOURS															
	NAME	FROM / TO	HRS	FROM / TO	HRS	FROM / TO	HRS	FROM / TO	HRS	FROM / TO	HRS	FROM / TO	HRS	FROM / TO	HRS	HOURS
MGMT	MANAGER															
	ASST MANAGER															
KITCHEN	HEAD COOK															
	ASSISTANT HEAD COOK															
	COOK															
	COOK															
	STEWARD															
	DISHWASHER															
	DISHWASHER															
DINING ROOM	DINING ROOM STAFF HEAD WAIT															
	WAIT															
	WAIT															
	BUSPERSON															
	HOST/ HOSTESS															
	CASHIER															

Tools and Functions of Management
Unit 2

Information Sheet

1. **Terms and definitions**

   a. **Motion economy** — Reduction in actual physical motions required to do a job so that the job can be done faster at an acceptable performance level

   b. **Motivation** — An inner drive that inspires a person to work toward a goal

   c. **Piece-work** — A production system that pays workers on a basis of quantity completed

   d. **Positive reinforcement** — Anything that rewards a person for a job well done

   e. **Self esteem** — A good opinion of one's self

   f. **Task** — A job to be performed

2. **Objectives of good management**

   a. Recruit and train the best personnel available.

   b. Set and maintain standards of conduct and operation through use of employee manuals, employee evaluations, and job descriptions.

   Note: This includes accurate record keeping procedures.

   c. Motivate and reward dedicated service.

   d. Promote the organizational image.

   e. Develop a management system that best meets the needs and objectives of the organization.

   f. Show a profit.

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Information Sheet

3. Management systems and their comparative effectiveness

System	Basic Concept	Motivation	Effectiveness
Paternalistic	Everyone is part of one big, happy family	Monetary, promotions, and fringe benefits	Fair, but shows no relation between job satisfaction and job performance
Scientific	Simplifying processes through analysis to eliminate waste and increase production	Bonus for surpassing quotas	Good, but is considered dehumanizing because it eliminates creative contributions from workers
Authoritative	People are basically lazy, have to be led, and only the boss is right	Do it or lose your job	Bad because the boss is not always right
Participative	Workers share planning functions with management	Monetary and self-esteem from positive reinforcement	Excellent; is the most used management system in food service
Personalized	Takes bits from all systems and adapts to local needs	Monetary and as decided by boss	Good if the boss is right; bad if the boss is wrong

4. Management responsibilities and their objectives

a. **Planning** — Setting goals, then thinking through the activities needed to achieve those goals

b. **Organizing** — Reducing general activities to specific tasks, and assigning tasks to take best advantage of workers' abilities

c. **Staffing** — Selecting people with skills that can best accomplish required tasks

d. **Directing** — Assuring that events occur at the proper place and in a proper time frame so that the combination of timing and task will produce a harmonious performance

e. **Controlling** — Exercising authority to regulate performance so that company standards will be achieved and maintained

f. **Decision making** — Weighing options and alternative courses of action to improve daily activities or handle emergencies

Information Sheet

g. **Forecasting** — Assessing future circumstances or events in light of their impact on the performance of the organization

h. **Scheduling** — Assigning a sufficient number of people to meet anticipated workloads

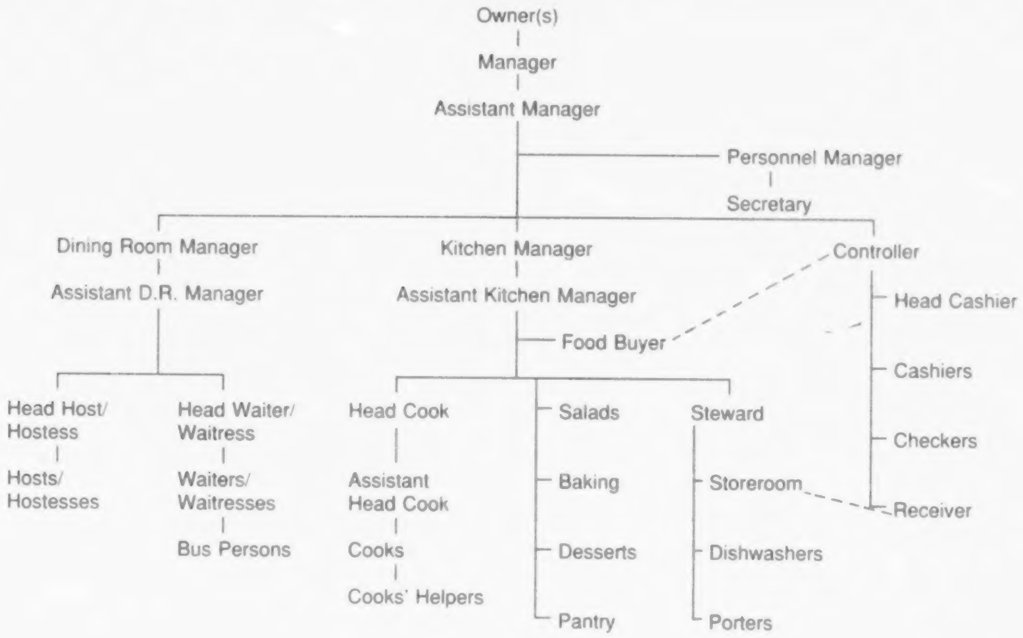
i. **Training** — Developing programs to help new employees become effective workers and to help experienced workers retain and polish skills

j. **Cross training** — Developing programs to assist employees in learning different jobs to encourage advancement

5. Effective management tools and their functions

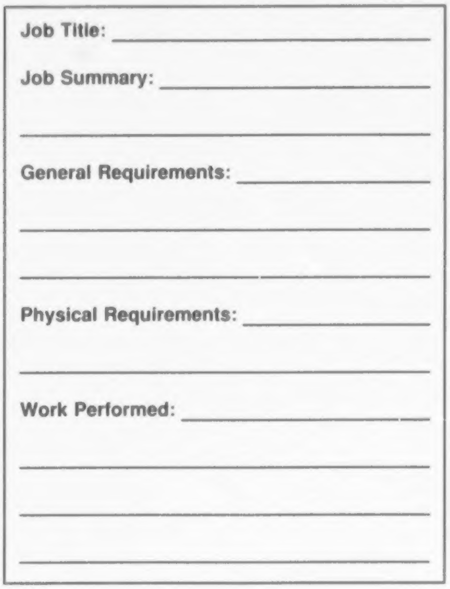
a. **Organizational charts** — Identify chain of command and make it easier for every employee to communicate needs or problems to a responsible person

Figure 1—Organizational Chart Example


Owner(s)
Manager
Assistant Manager
Personnel Manager
Secretary
Dining Room Manager
Kitchen Manager
Controller
Assistant D.R. Manager
Assistant Kitchen Manager
Head Cashier
Food Buyer
Cashiers
Head Host/ Hostess
Head Waiter/ Waitress
Head Cook
Salads
Steward
Checkers
Hosts/ Hostesses
Waiters/ Waitresses
Assistant Head Cook
Baking
Storeroom
Receiver
Bus Persons
Cooks
Desserts
Dishwashers
Cooks' Helpers
Pantry
Porters

b. **Job descriptions** — List specific duties and other essential job information and help match the right person to the right job

Figure 2—Job Description



Job Title: ____________________

Job Summary: ____________________

____

General Requirements: ____________________

____

____

Physical Requirements: ____________________

____

Work Performed: ____________________

____

____

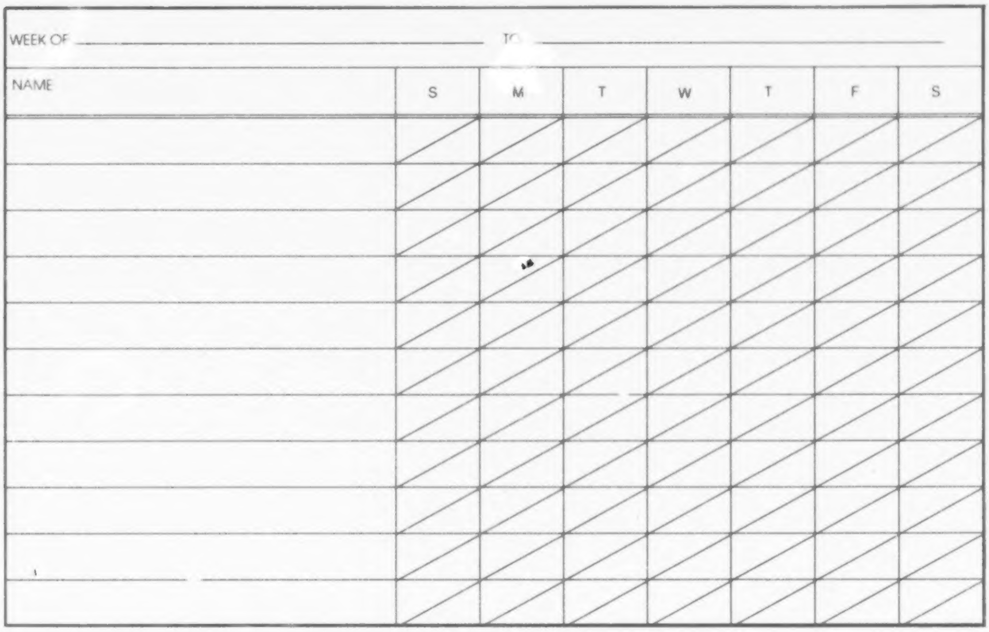
____

c. **Work improvement plans** — Serve to assist individual employees in ways to increase speed through work simplification and motion economy

Information Sheet

d. **Work schedules** — Act as a major means of communication between employer and employees about assigned work times

Figure 3—Weekly Work Schedule



WEEK OF ______________________ TO ______________________

NAME	S	M	T	W	T	F	S

6. **Guidelines for proper scheduling and forecasting**

   a. Daily peaks and valleys must be considered.

      Example: A busy restaurant that serves 500 lunches may have fewer than 100 guests for dinner the same evening.

   b. Weekly peaks and valleys must be considered.

      Example: A restaurant that serves 200 guests on a Saturday night may serve no more than 25 guests at Sunday breakfast.

Information Sheet

c. Yearly peaks and valleys must be considered.

Example: July and August are usually busy restaurant months; then there is a decline until the end of November, an increase for the holiday period, a sharp drop in January, and slow periods through April.

d. Forecasting for regional variations and special events must be considered.

Example: A restaurant in a ski resort may be the busiest in January when other restaurants are at a low, and a home football game in a college town can make Saturday the busiest day of the week.

7. General rules for scheduling personnel

a. Consider the daily, weekly, yearly, or special workload.

b. Consider the workload and schedule enough people to properly handle it, but do not schedule people in hopes the workload will be there.

c. Plan for irregular daily demands with irregular schedules as long as no one is overworked or unduly inconvenienced.

Example: A waitress that does not come in until 11 a.m. Monday and Tuesday may be needed to help with the 6 a.m. breakfast business on Wednesday and Thursday.

d. Plan for irregular daily demands with split shifts.

Example: A waiter who works luncheon can take the afternoon off, then come back and work dinner that evening. The split shift helps employees get enough hours to maintain a consistent weekly income.

Note: This is becoming unpopular, and management is beginning to use a short shift in place of the split shift.

e. Plan for regional variations or special events with part-time help, and keep files on available part-time help.

Example: In ski lodges or summer resorts where the seasons are short, a large full-time staff would be impractical.

f. Schedule at least one supervisor per shift.

g. Overlap schedules to allow for cleaning, food preparation, and peak hours.

Tools and Functions of Management
Unit 2

Assignment Sheet 1—Develop a Job Description for a Waiter/Waitress

Name ______________________ Overall Rating ________

Evaluation criteria	**Rating**
Description is complete and appropriate	______

Directions: Develop a job description for a waiter/waitress. This information can be obtained at your library, local food service business, or based on prior experience and knowledge.

Job Title: ______________________

Job Summary: ______________________

General Requirements: ______________________

Physical Requirements: ______________________

Work Performed: ______________________

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Tools and Functions of Management
Unit 2

Assignment Sheet 2—Schedule Waiters/Waitresses for a Given Restaurant Operation

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Wait staff is scheduled correctly for given data	______

Directions: Prepare a work schedule for the number of waiters/waitresses needed to handle the traffic outlined in the operational data below. You will need to calculate an average number of patrons served per hour per shift. Apply that number to the waiter/waitress requirements below.

Note: Remember that only 1 wait person is needed between 2 and 4 p.m.

Operational Data:

Open 6 a.m. to 10 p.m. daily

Serves breakfast, lunch, and dinner

Seating capacity 250

Serves 150 breakfasts from 6 a.m. to 11 a.m.

Serves 450 lunches from 11 a.m. to 4 p.m. (Less than 35 lunches are served from 2-4 p.m.)

Serves 510 dinners from 4 p.m. to 10 p.m.

Customer count average per day 1,100

Check average per customer $5.50

Average sales per day $6,050

Waiter/Waitress requirements in relation to number of patrons:

Patrons	0-35	36-55	56-72	73-90	91-108	109-126	127-144	145-170
Staff	2	3	4	5	6	7	8	9

Assignment Sheet 2

Meals Served Per Shift	Shift Hours	# of Hours Per Shift	Ave. # of Patrons Per Hour	Waiters/ Waitresses Required
______	6 a.m. - 11 a.m.	______	______	______
______	11 a.m. - 4 p.m.			______
	11 a.m. - 2 p.m.	______	______	______
______	4 p.m. - 10 p.m.	______	______	______

Cost Controls
Unit 3

Objective Sheet

Unit Objective

After completing this unit, the student should be able to determine the cost per portion of given recipes, identify purchasing control and storage control problems, and solve problems concerning ways to reduce labor costs. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Match terms related to cost controls with their correct definitions.
2. Distinguish among the basic types of costs.
3. Match other types of costs with their correct definitions.
4. List factors affecting food costs.
5. Select guidelines for effective cost control.
6. List five factors included in the cost of a meal.
7. Determine the menu price of a given item.
8. Complete statements concerning requirements for effective purchasing control.
9. Select factors affecting good storage control.
10. List factors affecting labor costs.
11. Complete statements concerning ways to reduce labor costs.
12. Determine the cost per portion of given recipes. (Assignment Sheet 1)
13. Identify purchasing control problems. (Assignment Sheet 2)
14. Identify storage control problems. (Assignment Sheet 3)
15. Solve problems concerning ways to reduce labor costs. (Assignment Sheet 4)

Cost Controls
Unit 3

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.
2. Review Teaching Suggestions section that follows. Plan for classroom activities.
3. Plan for enrichment of exceptional students as well as accommodation of special needs students.
4. Make a transparency from the transparency master included with this unit. This appears in the teacher guide only and is designed to be used with the following objective:

   TM 1—Cost of a Meal (Objective 6)
5. Obtain films, videotapes, and other resources to supplement instruction of this unit. See ordering information in the Suggested Supplemental Resources section that follows.
6. Develop teaching plan. Adjust for different learning styles.
7. Make copies of Unit Evaluation Form.

Delivery and Application

8. Provide students with unit of instruction.
9. Discuss unit and specific objectives
10. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.
11. Discuss the assignment sheets. Review criteria for evaluation of these activities.

Evaluation

12. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.
13. Make copies of the written test. Add or modify test questions as needed.

Suggested Activities

14. Give written test.

15. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.

16. Reteach and retest as required.

Teaching Suggestions

Note: Skill areas appearing in bold face type in the Teaching Suggestion refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Review the basic mathematics of ounces, pounds, gallons, quarts, and other measurement conversions students will be required to use for completing Assignment Sheet 1. (**Foundation skills--math**)

2. Invite an accountant for a food service operation to talk to the class about the importance of cost controls with emphasis on areas that create special problems. (**Communication skills, foundation skills--math**)

3. Invite managers from two or three different restaurants or hospitality organizations to talk to the class and compare different approaches to menu pricing. (**Communication skills, foundation skills--math**)

4. Invite a food service manager to talk to the class about the cost of advertising and public relations activities. (**Communication skills, foundation skills--math**)

5. Have students prepare a list of questions to ask a food service manager about the importance of cost controls. Then, provide manager with the list so that answers can be given as part of his/her presentation to students. Students may be assigned to record answers to the questions for later review/testing. (**Foundation skills--writing, listening,** and **creative thinking**)

6. Have students research factors affecting food costs (Objective 4) to determine which ones have the most impact. Before students complete research and share results, orally have class predict which factors will have the most effect on the food costs. (**Foundation skills-reading and writing, oral communication,** and **creative thinking**)

7. Have students divide into discussion groups and think of ways to rearrange the kitchen, service areas, and equipment in school cafeteria to save steps for workers. Then have them share ideas with class. Tie this activity in with Objective 11. (**Listening, oral communication, problem solving,** and **teamwork**)

Suggested Activities

Resources Used in Developing This Unit

1. Coltman, M. *Cost Control for the Hospitality Industry*, 2nd ed. New York: Van Nostrand Reinhold, 1989.
2. Crawford, H. and M. McDowell. *Math Workbook: Food Service/Lodging*. Boston: Medalist Publications, Inc., 1980.
3. Dittmer, Paul. *Principles of Food, Beverage, and Labor Cost Controls*, 4th ed. New York: Van Nostrand Reinhold, 1989.
4. Kotschevar, Lendal and Charles Levinson. *Quantity Food Purchasing*, 3rd ed. New York: Macmillan Publishing Co., 1988.
5. Powers, Tom. *Introduction to Management in the Hospitality Industry*, 3rd ed. New York: John Wiley and Sons, 1988.
6. Powers, Thomas and Jo Powers. *Food Service Operations: Planning and Control*. New York: John Wiley and Sons, 1984.
7. Stokes, John. *How to Manage a Restaurant or Institutional Food Service*, 4th ed. Dubuque, IA: Wm. C. Brown Co., 1982.

Suggested Supplemental Resource

Building Profits, Controlling Costs, Discovering Profit Centers, and Targeting Markets, 100-page book, 1985. Available from:

National Restaurant Association
1200 Seventeenth Street, NW
Washington, DC 20039-3097
800-424-5156

Cost Controls
Unit 3

Answers to Assignment Sheets

Assignment Sheet 1

A.	Extensions:	$ n/c
		.28
		.043
		.01
		.15
		.426
		.311
		.845
		.445
	Total Cost	$2.510
	Cost per Portion	.0174
	or	.02

B.	Extensions:	$ .085
		n/c
		.141
		.005
		.460
		.085
		.388
		.563
	Total Cost	$1.737
	Cost per Portion	.018
	or	.02

C.	Extensions:	$51.80
		.381
		1.350
		.285
		.189
		.043
		6.200
		n/c
	Total Cost	$60.248
	Cost per Portion	.603

D.	Extensions:	$4.080
		.919
		.225
		.007
		.046
		.131
		.231
	Total Cost	$5.639
	Cost per Portion	.094
	or	.10

Assignment Sheet 2

A. Failure to delegate purchasing responsibility to qualified people only

B. Failure to establish realistic quantity requirement (taking advantage of favorable pricing is no excuse)

C. Yes
To establish quality standards

Note: Student answers should approximate those given.

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Answers to Assignment Sheets

Assignment Sheet 3

A. The problem is a worn out ice maker. Get a new one, or get it fixed if it's salvageable.

B. Someone is stealing the black olives or sampling them too often at work. Improve security.

C. The problem is old lettuce. Stock needs to be properly rotated.

Note: Student answers should approximate those given.

Assignment Sheet 4

A. The waitresses are probably taking too many steps, and the equipment and service area should be rearranged to eliminate the problem.

B. The cook is probably not lazy and could use a good electric mixer to help with the work.

C. Encourage employees to talk about the problems, and then help them solve the problems. A suggestion box would be a good way for employees to do this.

Note: Student answers should approximate those given.

Cost Controls
Unit 3

Answers to Written Test

1. a. 4
   b. 7
   c. 1
   d. 8
   e. 3
   f. 5
   g. 6
   h. 2

2. b

3. a. 4
   b. 3
   c. 5
   d. 1
   e. 2

4. Any six of the following

   a. Short weights in delivery
   b. Spoilage
   c. Waste in preparation
   d. Careless portion control
   e. Poor utilization of leftovers
   f. Shortages at the cash register
   g. Missing guest checks
   h. Pilferage
   i. Employee meals

5. a, b, d, e, f, h

6. All of the following:

   a. Food
   b. Labor
   c. Fixed costs
   d. All other costs
   e. Percentage of profit

Answers to Written Test

7.

Ingredients	Unit Price
• lettuce	.21
• ham	.21
• turkey	.20
• American cheese	.13
• swiss cheese	.15
• egg	.05
• dressing	.06
• tomato	+ .02
	1.03 rounded up to next highest 10% = 1.10

Per Portion Raw Food Cost	=	1.10
35% food cost	=	× 2.9 (multiplying factor)
		3.19
10% of 1.10	=	+ .11 (condiments)
		3.30 = menu price

8. a. Qualified people only
   b. Quality
   c. Quantity
   d. Most favorable

9. a, b, d

10. Any six of the following:

    a. Type of service
    b. Number and variety of items offered on menu
    c. Extent of preparation required
    d. Geographical location
    e. Sales volume
    f. Training
    g. Labor contracts
    h. State and local legislation
    i. Overstaffing

11. a. Machinery
    b. Save steps
    c. Tasks
    d. Schedule
    e. Teamwork
    f. Convenience

Cost Controls
Unit 3

Written Test

Name ______________________________ Score ______________

1. Match the terms on the right with their correct definitions.

______a. Price paid for a market unit

______b. Size of an item as it is purchased

______c. Excess of the selling price of menu items over their cost

______d. Price of the amount used in a recipe

______e. Cost of each serving

______f. Difference between the selling price and the market price

______g. Cost of all ingredients that make up a food item in a recipe

______h. Price charged customer

1. Profit
2. Menu price
3. Per portion cost
4. Market price
5. Markup
6. Cost of recipe
7. Market unit
8. Extension price
9. Pilferage

2. Distinguish among the basic types of costs by placing an "X" next to the correct description of fixed costs.

______a. Costs that vary with volume but not in direct proportion to volume

______b. All costs associated with a physical property and its maintenance, and all costs that have little direct relationship to the volume of business

______c. All costs directly related to volume of business

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Written Test

3. Match other types of costs on the right with their correct definitions.

______a. Those costs which are basically fixed and difficult to change, especially rent and taxes

______b. All direct (wages and salaries) and indirect (benefits) charges incurred for each employee on the payroll

______c. Those costs which can be changed without much difficulty, particularly food and labor, but also advertising, maintenance, and equipment replacement

______d. The cost of all food stuffs delivered to the food service, whether raw or prepared

______e. All costs which are neither food nor labor costs

1. Food costs
2. Operating costs
3. Labor costs
4. Noncontrollable costs
5. Controllable costs

4. List six factors affecting food costs.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

f. ______________________________

5. Select from the following list the correct guidelines for effective cost control by placing an "X" in the appropriate blanks.

______a. Develop an effective menu planning system

______b. Develop an orderly purchasing system

______c. Use new recipes frequently

Written Test

______d. Develop realistic pricing system

______e. Use proper storage techniques

______f. Develop an efficient labor pool

______g. Encourage pilferage and waste

______h. Inject cost control awareness into the training program

6. List five factors included in the cost of a meal.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

7. Determine the menu price of a chef salad containing the following ingredients. Cost at 35%. Don't forget the added cost of condiments at 10%.

Ingredients	Market Price		Unit Price
6 oz. lettuce	$ .56/lb.	=	________
1½ oz. ham	2.24/lb.	=	________
1½ oz. turkey	2.08/lb.	=	________
1 oz. American cheese	2.08/lb	=	________
1 oz. Swiss cheese	2.40/lb	=	________
1 hard cooked egg	.54/doz.	=	________
3 oz. dressing	2.60/gal.	=	________
1 oz. tomato	.32/lb.	=	________
	Raw Food Cost	=	________
	Menu Price	=	________

Written Test

8. Complete the following statements concerning requirements for effective purchasing control by circling the correct words.

   a. Delegate purchasing responsibility to (qualified people only, all employees).

   b. Establish (quality, quantity) standards.

   c. Establish realistic (quality, quantity) requirements.

   d. Take advantage of the (most favorable, highest) prices.

9. Select factors affecting good storage control by placing an "X" in the appropriate blanks.

   _____a. Condition of facilities and equipment

   _____b. Proper arrangement and handling of food

   _____c. Proper location of storage facilities between dining room and kitchen

   _____d. Effective security

10. List six factors affecting labor costs.

    a. ______________________________

    b. ______________________________

    c. ______________________________

    d. ______________________________

    e. ______________________________

    f. ______________________________

11. Complete the following statements concerning ways to reduce labor costs by filling in the blanks with the correct words.

    a. Use ______________ to replace or assist manual work.

    b. Rearrange kitchen, service areas, and equipment to ______________.

    c. Apply work simplification methods to all ______________ and procedures.

    d. ______________ employees to match fluctuations in work.

    e. Encourage employee participation and ______________.

    f. Use ______________ foods.

*Permission to duplicate this test is granted.

Cost Controls
Unit 3

Unit Evaluation Form

Student Name ______________________ Unit Rating __________

Assignment Sheet 1—Determine the Cost Per Portion of Given Recipes Rating ______

Comments: ______________________

____

Assignment Sheet 2—Identify Purchasing Control Problems Rating ______

Comments: ______________________

____

Assignment Sheet 3—Identify Storage Control Problems Rating ______

Comments: ______________________

____

Assignment Sheet 4—Solve Problems Concerning Ways to Reduce Labor Costs Rating ______

Comments: ______________________

____

Written Test Scores

Pretest ______ Posttest ______ Other ______

Other ______________________

____

Teacher Signature ______________________ Date __________

Student Signature ______________________ Date __________

***Permission to duplicate this form is granted.**

Cost of a Meal

Food Cost + Labor Cost + Fixed Cost + All Other Cost + Gross Profit

= Sales

Example:

Food Cost (40%) + Labor Cost (30%) + Fixed Cost (10%) + All Other Cost (10%) + Gross Profit (10%)

= Sales (100%)

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Teacher Page 15

TM 1

Cost Controls
Unit 3

Information Sheet

1. **Terms and definitions**

   a. **Cost of recipe** — Cost of all ingredients that make up a food item in a recipe

   b. **Extension price** — Price of the amount used in a recipe

   c. **Market price** — Price paid for a market unit

   d. **Market unit** — Size of an item as it is purchased

   e. **Markup** — Difference between the selling price and the market price

   f. **Menu price** — Price charged customer

   g. **Per portion cost** — Cost of each serving

   h. **Pilferage** — Stealing, especially in small quantities over and over again

   i. **Profit** — Excess of the selling price of menu items over their cost

   Note: There is no profit without effective cost controls.

2. **Basic types of costs and their definitions**

   a. **Directly variable costs** — All costs directly related to volume of business

   Examples: Foods, beverages

   b. **Fixed costs** — All costs associated with a physical property and its maintenance, and all costs that have little direct relationship to the volume of business

   Examples: Rent, insurance, taxes, equipment leasing, loan interest

   c. **Semi-variable costs** — Costs that vary with volume but not in direct proportion to volume

   Examples: Labor, energy

Information Sheet

3. **Other types of costs and their definitions**

   a. **Controllable costs** — Those costs which can be changed without much difficulty, particularly food and labor, but also advertising, maintenance, and equipment replacement

   b. **Noncontrollable costs** — Those costs which are basically fixed and difficult to change, especially rent and taxes

   c. **Food costs** — The cost of all food stuffs delivered to the food service, whether raw or prepared. These costs should be considered as a percentage of the total sales and will be used to determine food cost percentage.

   d. **Labor costs** — All direct (wages and salaries) and indirect (benefits) charges incurred for each employee on the payroll

   e. **Operating costs** — All costs which are neither food nor labor costs

4. **Factors affecting food costs**

   a. Short weights in delivery

   b. Spoilage

   c. Waste in preparation

   d. Careless portion control

   e. Poor utilization of leftovers

   f. Shortages at the cash register

   g. Missing guest checks

   h. Pilferage

   i. Employee meals

5. **Guidelines for effective cost controls**

   a. Develop an effective menu planning system

   b. Develop an orderly purchasing system

   c. Use standardized recipes

   d. Develop realistic pricing system

Information Sheet

e. Use proper storage techniques

f. Develop an efficient labor pool

g. Establish controls for pilferage and waste

h. Inject cost control awareness into the training program

Note: Eliminating waste caused by improperly trained personnel will sometimes more than pay for the cost of a training program.

6. **Factors included in the cost of a meal**

a. Food

b. Labor

c. Fixed costs

d. All other costs

Examples: Paper products and cleaning supplies

e. Percentage of profit

Figure 1—Cost of a Meal

Food Cost + Labor Cost + Fixed Cost + All Other Cost + Gross Profit = Sales

Example:

Food Cost (40%) + Labor Cost (30%) + Fixed Cost (10%) + All Other Cost (10%) + Gross Profit (10%) = Sales (100%)

Information Sheet

7. **Determining menu prices** (Assignment Sheet 1)

   a. **Figure total cost of items on a per portion basis.** You will be dealing with menu items made from recipes or processed items.

      (1) Steps in costing recipes

         (a) Cost each ingredient separately.

         (b) Total the cost of all ingredients.

         (c) Divide the total cost by the number of available servings to find the per portion cost.

      (2) Steps to determine the per portion cost of processed items

         (a) Determine the portions in a market unit.

         Examples:
         - Hamburger patties are portioned 6-1 or six to a pound.
         - Hamburger buns are packaged 6 to a package.
         - French fries are purchased in 2-pound packages.

         (b) Determine the market price of a market unit.

         Examples:
         - A pound of hamburger costs 1.38.
         - Six hamburger buns cost .48.
         - French fries cost .32 a pound and 4 ounces are used per portion.

         (c) Determine raw food costs of per portion serving.

Examples:

•	One hamburger	.23
•	One bun	.08
•	4 oz. fries	.08
		$.39 = Raw food cost

Information Sheet

b. **Determine the food cost percentage figure**

(1) A desirable or projected food cost percentage is calculated by management using the formula: $\frac{\text{Calculated food cost}}{\text{Anticipated Sales}}$

Example: A restaurant anticipates yearly sales of $1,000,000 with food costs of $400,000

$$\frac{\text{Calculated food cost}}{\text{Anticipated sales}} = \frac{\$\ 400{,}000}{\$1{,}000{,}000} = 40\%$$

(2) Determine the figure which will be used as a factor for multiplying food costs by dividing the part into the whole to arrive at the multiplying factor. When the food cost percentage is established, the multiplying factor can be used in determining all menu prices.

Example: 40% food cost percentage

$$\begin{array}{rl} 2.5 & \\ 40\overline{)100} & \text{2.5 is multiplying factor} \\ \underline{80} & \\ 200 & \\ \underline{200} & \end{array}$$

c. **Multiply the per portion cost by the multiplying factor.**

Example:

$$\begin{array}{rl} .39 & = \text{raw food cost of 1 hamburger} \\ \underline{\times 2.5} & = \text{food cost percentage multiplying factor} \\ .195 & \\ \underline{.78} & \\ .975 & \text{(which should be rounded up to the next highest 10 percent of \$1.00)} \end{array}$$

d. **Add 10% cost of condiments** served with a menu item to the raw food costs. **Round off figure** to the next highest 10 percent to establish menu price.

Example: 10% of .39 is 3.9 cents added to raw food costs = 1.039 which rounded off to the next highest 10% would give a menu price of $1.10.

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Information Sheet

8. **Requirements for effective purchasing control** (Assignment Sheet 2)
    a. Delegate purchasing responsibility to qualified people only
    b. Establish quality standards
    c. Establish realistic quantity requirements
    d. Take advantage of the most favorable prices

9. **Factors affecting good storage control** (Assignment Sheet 3)
    a. Condition of facilities and equipment

        Examples: Roofs that do not leak and refrigeration units that maintain reliable temperatures

    b. Proper arrangement and handling of food

        Example: Stock rotation

    c. Proper location of storage facilities between receiving and preparation areas
    d. Effective security

        Example: Lock on door into storage area

10. **Factors affecting labor costs**
    a. Type of service
    b. Number and variety of items offered on menu
    c. Extent of preparation required
    d. Geographical location
    e. Sales volume
    f. Training
    g. Labor contracts
    h. State and local legislation
    i. Overstaffing

Information Sheet

11. **Ways to reduce labor costs** (Assignment Sheet 4)
    a. Use machinery to replace or assist manual work.
    b. Rearrange kitchen, service areas, and equipment to save steps.
    c. Apply work simplification methods to all tasks and procedures.
    d. Schedule employees to match fluctuations in work.
    e. Encourage employee participation and teamwork.
    f. Use convenience foods.

Cost Controls
Unit 3

Assignment Sheet 1—Determine the Cost Per Portion of Given Recipes

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are correct	______

Directions: Find the cost of each ingredient separately. Total the cost of all ingredients to get the total recipe cost. Divide the total cost by the number of portions to find the per portion cost.

Example:

Item: Meat Loaf
Yield: 50 portions
Size of portion: 6 oz.

Cost per portion $.29

Ingredients	Quantity	Market Price	Extension Price
Ground beef	12 lbs.	$1.09 per lb.	$13.08
Slightly beaten egg	6	.83 per doz.	.415
Minced onion	12 oz.	.30 per lb.	.228
Salt	2 oz.	.19 per lb.	.024
Pepper	1 oz.	2.50 per lb.	.156
Beef stock	1 gal.	.60 per gal.	.60
Bread crumbs	1 lb.	No charge (n/c)	______
		Total Cost	$14.503
		Cost per Portion	.29

Assignment Sheet 1

Problem A

Item: Cheddar Cheese Rolls
Yield: 12 dozen rolls
Size of portion: 3-in. roll
Cost per portion: ______

Ingredients	Quantity	Market Price	Extension Price
Water, 115°	1 lb.	n/c	______
Dry yeast	4 oz.	.07 oz.	______
Sugar	6 oz.	.115/lb.	______
Salt	2 oz.	.005/oz.	______
Milk, nonfat dry	6 oz.	.40/lb.	______
Eggs	1 lb.	.426/lb.	______
Butter	6 oz.	.83/lb.	______
Flour, bread or all-purpose	6 lb. 8 oz.	.13/lb.	______
Cheddar cheese	8 oz.	.89/lb.	______
		Total Cost	______
		Cost per Portion	______

Assignment Sheet 1

Problem B

Item: Soft Dinner Rolls
Yield: 8 dozen
Size of portion: 3-in. roll
Cost per portion: ____________

Ingredients	Quantity	Market Price	Extension Price
Yeast	4 oz.	$ .38/lb.	________
Water	2⅜ lbs.	n/c	________
Sugar	6 oz.	37.50/100 lbs.	________
Salt	1 oz.	6.40/80 lbs.	________
Egg solids	8 oz.	4.60/5 lbs.	________
Milk powder	4 oz.	3.40/10 lbs.	________
Butter	10 oz.	.62/lbs.	________
Bread flour	4 lbs. 8 oz.	12.50/100 lbs.	________
		Total Cost	________
		Cost per Portion	________

Assignment Sheet 1

Problem C

Item: Hungarian Goulash
Yield: 100 portions
Size of portion: 8 oz.
Cost per portion: ____________________

Ingredients	Quantity	Market Price	Extension Price
Boned chuck, 1½ in. squares	35 lbs.	$ 1.48/lb.	____________
Oil	1 pt.	15.40/5 gals.	____________
Onions, fine chopped	9 lbs.	7.50/50 lbs.	____________
Garlic, fine chopped	3 oz.	1.52/lb.	____________
Flour	1 lb. 8 oz.	6.30/50 lbs.	____________
Salt	4 oz.	.28/26 oz.	____________
Tomato puree	2 #10 cans	18.60/6 #10 cans	____________
White stock	1 gal.	n/c	____________
		Total Cost	____________
		Cost per Portion	____________

Assignment Sheet 1

Problem D

Item: Angel Cake
Yield: 6 pans, 60 portions
Size of portion: 10 per pan

Cost per portion: ________________

Ingredients	Quantity	Market Price	Extension Price
Egg whites	4 lbs. 4 oz.	$ .72/doz.	________
Sugar	3 lbs. 12 oz.	24.50/100 lbs.	________
Cream of tartar	1¼ oz.	1.98/11 oz.	________
Salt	½ oz.	1.15/5 lbs.	________
Vanilla	3 T.	3.90/gal.	________
Almond flavor	4½ t.	2.80/pt.	________
Cake flour	1 lb. 6 oz.	16.80/100 lbs.	________
		Total Cost	________
		Cost per Portion	________

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Cost Controls
Unit 3

Assignment Sheet 2—Identify Purchasing Control Problems

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Problems are correctly identified	______

Directions: The following situations demonstrate ineffective purchasing control. Read the situations carefully and answer as indicated.

A. An employee who had been on the job for less than two months accepted a food order that included many less-than-quality items and even items that had not been ordered.

Question: What requirement of effective purchasing control was violated in this situation?

Answer: ______________________________

B. An employee with considerable purchasing experience was offered a good deal on a supply of tomatoes and doubled up on the order. Twenty-five percent of the tomatoes spoiled before they could be used.

Question: What requirement of effective purchasing control was violated in this situation?

Answer: ______________________________

C. An employee authorized to accept purchases turned down an order of ham because the ham was too old. The order was rejected even though the employee knew the restaurant would probably go half a day without ham?

Question: Did the employee do the right thing?

Answer: ______________________________

Question: What requirement of effective purchasing control justifies your answer?

Answer: ______________________________

Cost Controls
Unit 3

Assignment Sheet 3—Identify Storage Control Problems

Name ______________________ Overall Rating __________

Evaluation criteria	**Rating**
Problems are correctly identified	______

Directions: The following situations demonstrate ineffective storage control. Read the situations carefully and answer as indicated.

A. For the third time in as many weeks an ice maker is on the blink and customers are complaining that there is not enough ice in their tea.

Question: What is the problem and what should be done about it?

Answer: ____

B. The per portion cost of a chef salad has been carefully figured, but on several occasions there has been a shortage of black olives, and the salad maker insists that care has been taken in the salad preparation. The situation has driven up the per portion cost of the salad.

Question: What is the problem and what should be done about it?

Answer: ____

____

C. The lettuce in the luncheon salads has slight traces of discoloration and simply does not look appealing.

Question: What is the problem and what should be done about it?

Answer: ____

____

Cost Controls
Unit 3

Assignment Sheet 4—Solve Problems Concerning Ways to Reduce Labor Costs

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Problems are correctly identified	______

Directions: The following problems demonstrate situations where labor costs could probably be reduced. Read the situations carefully and answer as indicated.

A. Waitresses frequently complain of being overly tired at the end of a shift, and specifically complain of tired, aching feet.

Question: Knowing that the waitresses are all in good health, what appears to be the problem and how would you solve it?

Answer: ____

____

B. The new cook with a flair for turning out excellent pastries has inspired increased orders from patrons, but the cook complains that it's difficult to keep up with orders because everything has to be mixed by hand.

Question: Is the cook simply lazy or is there a problem here, and if so, how would you solve it?

Answer: ____

____

C. There appears to be general discontent among the kitchen staff, but the manager can't decide what the problem really is.

Question: There's an obvious problem here, but how would you solve it?

Answer: ____

____

Keeping Records
Unit 4

Objective Sheet

Unit Objective

After completing this unit, the student should be able to complete various food service records including cash reports, food cost and labor cost summaries, and a profit/loss summary. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Distinguish between common records in a food service operation.
2. List three good record keeping habits.
3. Select characteristics of a production schedule.
4. List requirements of a production schedule.
5. Complete a list of requirements of a meal census.
6. Select requirements of a cash report.
7. List items of information needed for a special meal function sheet.
8. Complete a list of characteristics of a food cost summary.
9. Select requirements of a food cost summary.
10. List requirements of a labor cost summary.
11. Arrange in order the steps for figuring profit and loss.
12. Complete meal census for one week. (Assignment Sheet 1)
13. Complete daily and weekly cash reports. (Assignment Sheet 2)
14. Complete a food cost summary. (Assignment Sheet 3)
15. Calculate labor costs. (Assignment Sheet 4)
16. Complete a labor cost summary. (Assignment Sheet 5)
17. Complete a profit/loss summary. (Assignment Sheet 6)

Keeping Records
Unit 4

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.
2. Review Teaching Suggestions section that follows. Plan for classroom activities.
3. Plan for enrichment of exceptional students as well as accommodation of special needs students.
4. Develop teaching plan. Adjust for different learning styles.
5. Make copies of Unit Evaluation Form.

Delivery and Application

6. Provide students with unit of instruction.
7. Discuss unit and specific objectives.
8. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.
9. Discuss the assignment sheets. Review criteria for evaluation of these activities.

Evaluation

10. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.
11. Make copies of the written test. Add or modify test questions as needed.
12. Give written test.
13. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.
14. Reteach and retest as required.

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Suggested Activities

Teaching Suggestions

Note: Skill areas appearing in bold face type in the Teaching Suggestions refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Obtain different types of records from a restaurant, fast food operation, or specialty shop (donut shop) to display and discuss with class.
2. Invite a food service manager to class to discuss the importance of good record keeping. (**Communication skills, foundation skills--math**)
3. To reinforce Objective 7 obtain both completed and blank meal function sheets from local food service establishments and show examples to students.
4. Make copies of a blank meal function sheet for students to use in booking imaginary meal functions. Have students role play as a customer and manager, reversing roles so that all students will have an opportunity to complete a meal function sheet and to create their own function. Have students negotiate meal price as part of activity. (**Writing, listening, oral communication, creative thinking, interpersonal relations,** and **negotiation**)

Resources Used in Developing This Unit

1. Brymer, Robert. *Introduction to Hotel and Restaurant Management*, 5th ed. Dubuque, IA: Kendall-Hunt Publishing Co., 1987.
2. Knight, John and Lendal Kotschevar. *Quantity Food Production, Planning, and Management*, 2nd ed. New York: Van Nostrand Reinhold, 1988.
3. Powers, Tom. *Introduction to Management in the Hospitality Industry*, 3rd ed. New York: John Wiley and Sons, 1988.
4. Stokes, John. *How to Manage a Restaurant or Institutional Food Service*, 4th ed. Dubuque, IA: Wm. C. Brown Co., 1982.

Keeping Records
Unit 4

Answers to Assignment Sheets

Assignment Sheet 1

Meal Census

	S	M	T	W	T	F	S	Total for Week
Customer Meals	719	467	485	588	630	650	784	4323
Employee Meals	6	4	4	4	4	6	8	36
Total Meals Served	725	471	489	592	634	656	792	4359

Assignment Sheet 2

Daily Cash Reports

	S	M	T	W	T	F	S
Cash on Hand	3923	2694	2798	3409	3649	3889	4827
Cash Over/Short	(2)	(6)	(2)	9	(1)	(11)	2

Weekly Cash Report

Gross Sales Total	$25,200
Cash on Hand Total	25,189
Cash Over/Short Total	(11)

Answers to Assignment Sheets

Assignment Sheet 3

Food Cost Summary

	S	M	T	W	T	F	S	Weekly Total
Gross Sales	3925	2700	2800	3400	3650	3900	4825	25200
(7% Tax)	(274.75)	(189)	(196)	(238)	(255.50)	(273)	(337.75)	(1764)
Net Sales	3650.26	2511	2604	3162	3394.50	3627	4487.25	23436
							Food Cost	9372
Food Cost %	40%	40%	40%	40%	40%	40%	40%	40%

Answers to Assignment Sheets

Assignment Sheet 4

Page One Labor Costs

Name	Total Hours	Weekly Wages
Kitchen Supervisor	40	425.20
Head Cook	40	392.00
Assistant Cook	40	270.00
Backup Cook 1	40	230.00
Backup Cook 2	40	230.00
Baker 1	40	230.00
Baker 2	40	230.00
Kitchen Prep 1	40	190.00
Kitchen Prep 2	40	190.00
Kitchen Prep 3	40	190.00
Dishwasher 1	40	180.00
Dishwasher 2	40	180.00
Dishwasher 3	40	180.00
Steward 1	40	190.00
Steward 2	37	175.75
Steward 3	40	190.00
Page One Sub Total		3672.95

Page Two Labor Costs

Name	Total Hours	Weekly Wages
Dining Room Suprvsr.	40	280.00
Host	24	114.00
Hostess 1	24	114.00
Hostess 2	30	142.50
Cashier 1	20	95.00
Cashier 2	40	190.00
Cashier 3	31	147.25
Waiter/Waitress 1	40	93.60
Waiter/Waitress 2	37	86.58
Waiter/Waitress 3	40	93.60
Waiter/Waitress 4	40	93.60
Waiter/Waitress 5	36	84.24
Waiter/Waitress 6	34	79.56
Waiter/Waitress 7	36	84.24
Waiter/Waitress 8	35	81.90
Waiter/Waitress 9	32	74.88
Bus Person 1	27	121.50
Bus Person 2	40	180.00
Bus Person 3	38	171.00
Page Two Sub Total		2327.45
Page One Sub Total		3672.95
Total Labor Cost		6000.40

Answers to Assignment Sheets

Assignment Sheet 5

Labor Cost Summary	
Labor Cost	6000.40
Taxes 11%	660.04
Benefits 5%	330.02
Total Labor Costs	6960.46
Labor Cost Percentage	30%

Assignment Sheet 6

Profit/Loss Statement		
Total Net Sales	23436	
(Food Costs)	9372	40 Food Cost %
(Labor Costs)	6960.46	30 Labor Cost %
(Operating Costs)	4688	20 Operating Cost %
Cash Over/Short	(11)	
Profit or (Loss)	2404.54	10 P/L %

Keeping Records
Unit 4

Answers to Written Test

1. a. P e. S
   b. P f. S
   c. S g. P
   d. P h. S

2. a. Be accurate
   b. Write legibly
   c. Turn in records on time

3. a, d

4. Any three of the following:

   a. Number to prepare
   b. Menu item
   c. Yield
   d. Special instructions
   e. Amount left over
   f. Servings used

5. a. Number of meals
   b. Employee

6. a, b, c, d

7. Any four of the following:

   a. Organization
   b. Date
   c. Time
   d. Room
   e. Estimated number
   f. Contact person arranging function
   g. Address
   h. Phone number
   i. Contact person booking function
   j. Details
   k. Menu
   l. Special notes
   m. Price

Answers to Written Test

8. a. Production supervisor
   b. Daily

9. All are correct.

10. a. Labor cost
    b. Taxes
    c. Benefit factor

11. a. 4
    b. 3
    c. 1
    d. 2

Keeping Records
Unit 4

Written Test

Name ______________________________ Score ____________

1. Distinguish between common records in a food service operation by placing a "P" next to production records and an "S" next to service records.

   ______a. Menu

   ______b. Food cost summary

   ______c. Cash report

   ______d. Standardized recipe

   ______e. Labor cost summary

   ______f. Meal census

   ______g. Production schedule

   ______h. Special meal function sheet

2. List three good record keeping habits.

   a. ____

   b. ____

   c. ____

3. Select characteristics of a production schedule by placing an "X" in the appropriate blanks.

   ______a. Filled out by production supervisor

   ______b. Filled out monthly

   ______c. Given to cooks at least one day prior to production

   ______d. Likes and dislikes of customers kept on file for future use

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Written Test

4. List three requirements of a production schedule.

   a. ____________________

   b. ____________________

   c. ____________________

5. Complete the following list of requirements of a meal census by filling in the blanks.

   a. ____________________ served to customers

      (1) Breakfast
      (2) Lunch
      (3) Diner

   b. ____________________ meals

6. Select requirements of a cash report by placing an "X" in the appropriate blanks.

   ______a. Beginning reading

   ______b. Ending reading

   ______c. Cash register totals

   ______d. Cash on hand

   ______e. Charge tickets

7. List four items of information needed for a special meal function sheet.

   a. ____________________

   b. ____________________

   c. ____________________

   d. ____________________

Written Test

8. Complete the following list of characteristics of a food cost summary by circling the correct words.

   a. Filled out by (owner, production supervisor)

   b. Filled out (daily, monthly)

   c. Kept on file for future use

      (1) Cost of food for menu

      (2) Cost of food for cycle

9. Select requirements of a food cost summary by placing an "X" in the appropriate blanks.

   ______a. Income (net sales)

   ______b. Cost of food used

   ______c. Totals to date

   ______d. Food cost percentage

10. List three requirements of a labor cost summary.

    a. ______________________________

    b. ______________________________

    c. ______________________________

11. Arrange in order the steps for figuring profit and loss by numbering from one to four.

    ______a. Subtract operating costs

    ______b. Subtract labor costs

    ______c. Add total net sales

    ______d. Subtract food costs

***Permission to duplicate this test is granted.**

Keeping Records
Unit 4

Unit Evaluation Form

Student Name ______________________ Unit Rating ________

Assignment Sheet 1—Complete Meal Census for One Week Rating ______

Comments: ______________________

Assignment Sheet 2—Complete Daily and Weekly Cash Reports Rating ______

Comments: ______________________

Assignment Sheet 3—Complete a Food Cost Summary Rating ______

Comments: ______________________

Assignment Sheet 4—Calculate Labor Costs Rating ______

Comments: ______________________

Assignment Sheet 5—Complete a Labor Cost Summary Rating ______

Comments: ______________________

Assignment Sheet 6—Complete a Profit/Loss Summary Rating ______

Comments: ______________________

Written Test Scores

Pretest ______ Posttest ______ Other ______

Other ______________________

Teacher Signature ______________________ Date ________

Student Signature ______________________ Date ________

***Permission to duplicate this form is granted.**

Keeping Records
Unit 4

Information Sheet

1. **Common records in food service**
    a. Production
        (1) Menu
        (2) Standardized recipe
        (3) Production schedule
        (4) Food cost summary
    b. Service
        (1) Meal census
        (2) Cash reports (daily and weekly)
        (3) Special meal function sheet
        (4) Labor cost summary
2. **Good record keeping habits**
    a. Be accurate.
    b. Write legibly.
    c. Turn in records on time.
3. **Characteristics of a production schedule**
    a. Filled out by production supervisor
    b. Filled out daily
    c. Given to cooks at least one week prior to production
    d. Kept on file for future use
        (1) Amount to serve on next cycle
        (2) Likes and dislikes of customer

Information Sheet

4. **Requirements of a production schedule**
    - a. Number to prepare
    - b. Menu item
    - c. Yield
    - d. Special instructions
    - e. Amount left over
    - f. Servings used
5. **Requirements of a meal census** (Assignment Sheet 1)
    - a. Number of meals served to customers
        - (1) Breakfast
        - (2) Lunch
        - (3) Dinner
    - b. Employee meals
6. **Requirements of a cash report** (Assignment Sheet 2)
    - a. Beginning reading
    - b. Ending reading
    - c. Cash register totals
    - d. Cash on hand
7. **Items of information needed for a special meal function sheet**
    - a. Organization
    - b. Date
    - c. Time
    - d. Room
    - e. Estimated number

Information Sheet

- f. Contact person arranging function
- g. Address
- h. Phone number
- i. Contact person booking function
- j. Details
- k. Menu
- l. Special notes
- m. Price

  Note: Some food service operations require that a contract be signed before final arrangements are made.

8. **Characteristics of a food cost summary**

   Note: Food cost = (beginning inventory + food purchases) – ending inventory.

   - a. Filled out by production supervisor
   - b. Filled out daily
   - c. Kept on file for future use
     - (1) Cost of food for menu
     - (2) Cost of food for cycle

9. **Requirements of a food cost summary** (Assignment Sheet 3)

   - a. Income (net sales)
     - (1) Regular
     - (2) Special
   - b. Cost of food used

Information Sheet

   c. Totals to date

   d. Actual food cost percentage—Daily food cost percentage is calculated as follows:

$$\frac{\text{Actual Food Cost}}{\text{Actual Total Income}} = \text{Actual Food Cost Percentage}$$

10. **Requirements of a labor cost summary** (Assignment Sheets 4 and 5)

   a. Labor costs

      (1) Full time (FT) hours

      (2) Full time average hour rate

      (3) Part time (PT) hours

      (4) Part time average hour rate

   b. Taxes

   c. Benefit factor

   Note: This includes annual leave, sick leave, holidays, insurance, uniforms, and meals.

11. **Steps for figuring profit and loss**

   a. Add total net sales

   b. Subtract food costs

   c. Subtract labor costs

   d. Subtract operating costs

   Note: This can be a fixed amount if you figure operating costs for a full year and divide by 12 months.

Keeping Records
Unit 4

Assignment Sheet 1—Complete Meal Census for One Week

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are correct	______

Directions: Calculate number of meals for one week from the following information:

Meals Served	S	M	T	W	T	F	S
Customer Meals — Breakfast	294	169	175	212	228	195	240
— Lunch	327	180	187	227	243	260	242
— Dinner	98	118	123	149	159	195	302
Employee Meals	6	4	4	4	4	6	8

Meal Census

	S	M	T	W	T	F	S	Total for Week
Customer Meals	_____	_____	_____	_____	_____	_____	_____	_____
Employee Meals	_____	_____	_____	_____	_____	_____	_____	_____
Total Meals Served	_____	_____	_____	_____	_____	_____	_____	_____

Keeping Records
Unit 4

Assignment Sheet 2—Complete Daily and Weekly Cash Reports

Name ______________________ Overall Rating __________

Evaluation criteria	**Rating**
Daily reports are correct	______
Weekly report is correct	______

Directions: Complete the following daily cash reports. Register readings have been supplied. Cash on Hand figures are the same as these daily deposits:

Sun.	Mon.	Tues.	Wed.	Thur.	Fri	Sat.
$3923	2694	2798	3409	3649	3889	4827

Daily Cash Reports

Sunday Cash Report

Beginning Reading	0	
Ending Reading	3925 =	Gross sales
	______	Cash on Hand
	______	Cash Over/Short

Monday Cash Report

Beginning Reading	0	
Ending Reading	2700 =	Gross sales
	______	Cash on Hand
	______	Cash Over/Short

Tuesday Cash Report

Beginning Reading	0	
Ending Reading	2800 =	Gross sales
	______	Cash on Hand
	______	Cash Over/Short

Wednesday Cash Report

Beginning Reading	0	
Ending Reading	3400 =	Gross sales
	______	Cash on Hand
	______	Cash Over/Short

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Assignment Sheet 2

Thursday Cash Report

Beginning Reading	0	
Ending Reading	3650 =	Gross sales
	______	Cash on Hand
	______	Cash Over/Short

Friday Cash Report

Beginning Reading	0	
Ending Reading	3900 =	Gross sales
	______	Cash on Hand
	______	Cash Over/Short

Saturday Cash Report

Beginning Reading	0	
Ending Reading	4825 =	Gross sales
	______	Cash on Hand
	______	Cash Over/Short

Directions: Complete weekly cash report as follows:

Gross Sales Total - Total of Sun. - Sat.
subtract Cash on Hand - Total of Sun. - Sat.
equals Cash Over/Short - Use this figure on Profit/Loss Statement (Assignment Sheet 6)

Weekly Cash Report

Gross Sales Total ____________
Cash on Hand Total ____________
Cash Over/Short Total ____________

Keeping Records
Unit 4

Assignment Sheet 3—Complete a Food Cost Summary

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are correct	______

Directions: Complete a food cost summary using the following steps.

1. Record daily gross sales from daily cash reports (Assignment Sheet 2).
2. Subtract 7% sales tax (gross sales × .07) to determine net sales.
3. Calculate food cost percentage as follows: Food cost (given) divided by net sales.

Food Cost Summary

	S	M	T	W	T	F	S	Weekly Total
Gross Sales	____	____	____	____	____	____	____	________
(7% tax)	(____)	(____)	(____)	(____)	(____)	(____)	(____)	(________)
Net Sales	____	____	____	____	____	____	____	________
Food Costs	$1452	1007	1044	1264	1360	1455	1790	________
Food Costs %	____%	____%	____%	____%	____%	____%	____%	________%

Note: Total net sales figure will be used for Labor Cost Summary (Assignment Sheet 5) and Profit/Loss Statement (Assignment Sheet 6). Total food cost figure will be used for Profit/Loss Statement (Assignment Sheet 6).

Keeping Records
Unit 4

Assignment Sheet 4—Calculate Labor Costs

Name ______________________________ Overall Rating __________

Evaluation criteria	Rating
Hours are correct	______
Wages are correct	______
Total labor cost is correct	______

Directions: Use the weekly work schedules (Pages One and Two included on pages 59 and 60) as a guide to calculate total labor dollars for the week. These are hourly employees. Management salaries are included as part of operating costs. Add each employee's hours for the week and multiply by the wage rate.

Page One Labor Costs

Name	Wage Rate	×	Total Hours	=	Weekly Wages
Kitchen Supervisor	10.63		________		________
Head Cook	9.80		________		________
Assistant Cook	6.75		________		________
Backup Cook #1	5.75		________		________
Backup Cook #2	5.75		________		________
Baker #1	5.75		________		________
Baker #2	5.75		________		________
Kitchen Prep #1	4.75		________		________
Kitchen Prep #2	4.75		________		________
Kitchen Prep #3	4.75		________		________
Dishwasher #1	4.50		________		________
Dishwasher #2	4.50		________		________
Dishwasher #3	4.50		________		________
Steward #1	4.75		________		________
Steward #2	4.75		________		________
Steward #3	4.75		________		________
Page One Sub Total					________

Assignment Sheet 4

Page Two Labor Costs

Name	Wage Rate	×	Total Hours	=	Weekly Wages
Dining Room Supervisor	7.00				
Host	4.75				
Hostess #1	4.75				
Hostess #2	4.75				
Cashier #1	4.75				
Cashier #2	4.75				
Cashier #3	4.75				
Waiter/Waitress #1	2.34				
Waiter/Waitress #2	2.34				
Waiter/Waitress #3	2.34				
Waiter/Waitress #4	2.34				
Waiter/Waitress #5	2.34				
Waiter/Waitress #6	2.34				
Waiter/Waitress #7	2.34				
Waiter/Waitress #8	2.34				
Waiter/Waitress #9	2.34				
Bus Person #1	4.50				
Bus Person #2	4.50				
Bus Person #3	4.50				
Page Two Sub Total					
Page One Sub Total					
Total Labor Cost					

Note: Total Labor Cost figure will be used to complete Labor Cost Summary in Assignment Sheet 5.

Assignment Sheet 4

Page One Weekly Work Schedule

Restaurant Hours: Breakfast—7 a.m.-11 a.m., Lunch—11 a.m.-2 p.m., Closed—2 p.m.-5 p.m., Dinner—5 p.m.-10 p.m.

DAY	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
DATE								
Planned Sales $	3750	2600	2700	3300	3500	3750	4700	24300

Name	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	TOTAL
Kitchen Supervisor	6/3	9	8/3	7	X		X		6/2	8	11/7	8	11/7	8	
Head Cook	6/2	8	6/2	8	6/2	8	X		X		6/2	8	6/2	8	
Assistant Cook	X		6/2	8	X		6/2	8	6/2	8	2/10	8	2/10	8	
Backup Cook #1	2/10	8	X		2/10	8	2/10	8	2/10	8	X		2/10	8	
Backup Cook #2	8/4	8	2/10	8	X		X		6/2	8	6/2	8	7/3	8	
Baker #1	6/2	8	6/2	8	X		X		6/2	8	6/2	8	6/2	8	
Baker #2	X		X		6/2	8	6/2	8	2/10	8	2/10	8	2/10	8	
Kitchen Prep #1	6/2	8	X		X		11/7	8	10/6	8	11/7	8	8/4	8	
Kitchen Prep #2	7/2	7	4/9	5	11/7	8	X		4/10	6	2/10	8	4/10	6	
Kitchen Prep #3	12/8	8	X		6/10	4	5/9	4	6/2	8	6/2	8	6/2	8	
Dishwasher #1	7/3	8	X		X		7/3	8	7/3	8	7/3	8	7/3	8	
Dishwasher #2	X		4/11	7	4/11	7	4/11	7	4/11	7	5/11	6	5/11	6	
Dishwasher #3	3/11	8	7/3	8	7/3	8	X		X		3/11	8	3/11	8	
Steward #1	7/3	8	X		X		3/11	8	3/11	8	7/3	8	7/3	8	
Steward #2	3/11	8	3/11	8	3/11	8	X		X		3/11	8	5/10	5	
Steward #3	X		7/3	8	7/3	8	7/3	8	7/3	8	X		3/11	8	

Assignment Sheet 4

Page Two Weekly Work Schedule

DAY	SUN		MON		TUE		WED		THU		FRI		SAT		TOTAL
DATE															
Planned Sales $															
Name	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	From To	Hrs	TOTAL
Dining Room Supervisor	7/2	7	✕		✕		7/2	7	7/3	8	4/10	6	10/10	12	
Host	10:30/2:30	4	10:30/2:30	4	10:30/2:30	4	10:30/2:30	4	✕		4:30/8:30	4	4:30/8:30	4	
Hostess #1	4:30/10:30	6	4:30/10:30	6	✕		✕		10:30/2:30	4	10:30/2:30	4	10:30/2:30	4	
Hostess #2	✕		✕		4:30/10:30	6	4:30/10:30	6	4:30/10:30	6	4:30/10:30	6	4:30/10:30	6	
Cashier #1	5/10	5	5/10	5	✕		✕		5/10	5	✕		5/10	5	
Cashier #2	✕		7/3	8	7/3	8	7/3	8	7/3	8	7/3	8	✕		
Cashier #3	7/3	8	✕		5/10	5	5/10	5	✕		5/10	5	7/3	8	
Waiter/Waitress #1	6/11	5	7/11	4	✕		6/2	8	6/2	8	6/2	8	7/2	7	
Waiter/Waitress #2	7/3	8	10/3	5	✕		✕		7/3	8	7/3	8	6/2	8	
Waiter/Waitress #3	7/2	7	7/2	7	✕		7/3	8	8/2	6	8/2	6	8/2	6	
Waiter/Waitress #4	9/4	7	✕		8/3	7	8/2	6	10/4	6	10/4	6	8/4	8	
Waiter/Waitress #5	10/4	6	4/8	4	10/6	8	10/4	6	✕		4/10	6	4/10	6	
Waiter/Waitress #6	10/2	4	✕		4/10	6	4/10	6	5/11	6	4/10	6	4/10	6	
Waiter/Waitress #7	4/11	7	5/11	6	5/10	5	✕		5/11	6	5/11	6	5/11	6	
Waiter/Waitress #8	5/11	6	5/10	5	5/11	6	5/11	6	✕		5/11	6	5/11	6	
Waiter/Waitress #9	✕		10/4	6	6/2	8	5/11	6	4/10	6	✕		5/11	6	
Bus Person #1	5/10	5	5/10	5	5/10	5	✕		✕		5/11	6	5/11	6	
Bus Person #2	7/3	8	✕		✕		7/3	8	7/3	8	7/3	8	7/3	8	
Bus Person #3	✕		7/3	8	7/3	8	5/10	5	5/10	5	4/10	6	4/10	6	

Keeping Records
Unit 4

Assignment Sheet 5—Complete a Labor Cost Summary

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers were correct	______

Directions: Complete a labor cost summary using the following steps.

1. Record Labor Cost figure from Assignment Sheet 4.
2. Add taxes of 11%: Labor cost multiplied by .11
3. Add benefits of 5%: Labor cost multiplied by .05
4. Calculate Labor Cost percentage: Total labor cost divided by net sales from Food Cost Summary (Assignment Sheet 3)

Labor Cost Summary

Labor Cost	__________
Taxes 11%	__________
Benefits 5%	__________
Total Labor Costs	__________
Labor Cost Percentage	__________

Note: Total Labor Cost figure will be used to complete Profit/Loss Statement (Assignment Sheet 6).

Keeping Records
Unit 4

Assignment Sheet 6—Complete a Profit/Loss Statement

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are correct	______

Directions: Complete a Profit/Loss Statement using the following steps.

1. Record Total Net Sales figure (from Food Cost Summary)
2. Subtract Food Cost figure (from Food Cost Summary)
3. Record Food Cost percentage (from Food Cost Summary)
4. Subtract Labor Cost figure (from Labor Cost Summary)
5. Record Labor Cost percentage (from Labor Cost Summary)
6. Subtract Operating Cost (calculate from following information):

OPERATING COSTS

S	M	T	W	T	F	S	TOTAL
$722	525	542	638	679	718	864	______

7. Determine Operating Cost percentage as follows: Total Operating Cost divided by Total Net Sales
8. Add or subtract Cash Over/Short (from Weekly Cash Report)
9. Determine Profit/Loss Percentage as follows: Profit divided by Total Net Sales

Assignment Sheet 6

Profit/Loss Statement

1.	Total Net Sales		______			
2.	(Food Costs)	–	______	3.	______	Food Cost %
	subtotal		______			
4.	(Labor Costs)	–	______	5.	______	Labor Cost %
	subtotal		______			
6.	(Operating Costs)	–	______	7.	______	Operating Costs %
	subtotal		______			
8.	Cash Over/Short	+ or –	______			
	Profit/Loss	=	______	9.	______	Profit/Loss %

Purchasing and Receiving
Unit 5

Objective Sheet

Unit Objective

After completing this unit, the student should be able to complete charts and checklists for food purchasing and receiving and write specifications for various foods. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Match terms related to purchasing and receiving with their correct definitions.
2. Select true statements concerning techniques for working with salespeople.
3. Distinguish between basic methods of purchasing.
4. Complete statements concerning optional methods of purchasing.
5. Arrange in order the steps in purchasing.
6. Match quality standards with their applications.
7. Select from a list the recommended information for food labels.
8. Complete statements concerning functions of specifications.
9. Select true statements concerning functions of USDA grading.
10. Complete statements concerning the first rules of receiving.
11. Arrange in order the steps in receiving.
12. Select true statements concerning guidelines for receiving fresh produce.
13. Complete statements concerning guidelines for receiving frozen foods.
14. Select true statements concerning guidelines for receiving poultry.
15. Complete statements concerning guidelines for receiving meats.

Objective Sheet

16. Select true statements concerning guidelines for receiving pastries.

17. Complete statements concerning guidelines for receiving dairy products.

18. Complete a purchasing chart to show amounts to order. (Assignment Sheet 1)

19. Complete a purchasing chart to show amounts needed. (Assignment Sheet 2)

20. Complete a food purchase checklist. (Assignment Sheet 3)

21. Complete a food receiving checklist. (Assignment Sheet 4)

22. Write specifications for a canned food, a fresh food, and a frozen food. (Assignment Sheet 5)

Purchasing and Receiving
Unit 5

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.

2. Review Teaching Suggestions section that follows. Plan for classroom activities.

3. Plan for enrichment of exceptional students as well as accommodation of special needs students.

4. Make transparencies from the transparency masters included with this unit. These appear in the teacher guide only and are designed to be used with the following objectives:

   TM 1—Quotation and Order Sheet (Objective 3)
   TM 2—Purchase Order (Objective 3)
   TM 3—Competitive Bid (Objective 3)
   TM 4—USDA Grades (Objective 6)
   TM 5—First Rules of Receiving (Objective 10)
   TM 6—Credit Memorandum (Objective 11)

5. Obtain films, videotapes, and other resources to supplement instruction of this unit. See ordering information in the Suggested Supplemental Resources section that follows.

6. Develop teaching plan. Adjust for different learning styles.

7. Make copies of Unit Evaluation Form.

Delivery and Application

8. Provide students with unit of instruction.

9. Discuss unit and specific objectives.

10. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.

11. Discuss the assignment sheets. Review criteria for evaluation of these activities.

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Suggested Activities

Evaluation

12. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.

13. Make copies of the written test. Add or modify test questions as needed.

14. Give written test.

15. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.

16. Reteach and retest as required.

Teaching Suggestions

Note: Skill areas appearing in bold face type in the Teaching Suggestions refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Arrange for a trip to a local market where students can observe the procedures of receiving and selling commodities such as the local farmers' market. (**Communication skills, interpersonal relations**)

2. Invite a purveyor of a local market to talk to the class about doing business with various types of food service operations. (**Communication skills**)

3. Review the buying procedure used in your institution.

4. Have several food items available to demonstrate to the class USDA grading and the importance of labels.

5. Demonstrate can cutting methods to class.

6. Make proper arrangements for students to visit local restaurants or a school's (or vo-tech's) food service department so they can complete Assignment Sheets 3 and 4.

7. Provide samples of specifications so students can complete Assignment Sheet 5.

Suggested Activities

8. Provide students with various food items and have them check for recommended information on food labels (Objective 7) and record their findings for each item. Have them pay particular attention to dietary claims and the terms "artificial" or "preservative." Have students discuss in class how they think the information listed on a label affects an individual's decision to buy that item. (**Reading, writing, oral communication,** and **problem solving**)

9. Have students role play to practice techniques for working with salespeople (Objective 2). Provide them with various situations to act out such as dealing with a pushy salesperson, responding to a salesperson who offers a bribe, or handling a salesperson who attempts to discredit other salespeople and/or their products. A class discussion would be helpful to conclude this activity to enable students to share how they handled the given situations. (**Listening, oral communication, problem solving,** and **interpersonal relations**)

Resources Used in Developing This Unit

1. Crawford, H. and M. McDowell. *Math Workbook: Food Service/Lodging.* Boston: Medalist Publications, Inc., a subsidiary of Cahners Publishing Co., Inc., 1980.

2. Knight, John and Lendal Kotschevar. *Quantity Food Production, Planning, and Management*, 2nd ed. New York: Van Nostrand Reinhold, 1988.

3. Kotschevar, Lendal. *Standards, Principles, and Techniques in Quantity Food Production*, 4th ed. New York: Van Nostrand Reinhold, 1988.

4. Kotschevar, Lendal and Charles Levinson. *Quantity Food Purchasing*, 3rd ed. New York: Macmillan Publishing Co., 1988.

5. Morgan, William J. Jr. *Supervision and Management of Quantity Food Preparation*, 3rd. ed. Berkeley, CA: McCutchan Publishing Corp.

6. Warfel, M. and F. Waskey. *The Professional Food Buyer.* Berkeley, ~~CA~~: McCutchan Publishing Corp., 1979.

Suggested Activities

Suggested Supplemental Resources

1. Videotape—*Producing Profits: Buying, Receiving, and Storing Fresh Fruits and Vegetables*, E15, 1988.
2. Booklets
    a. *Buying, Handling, and Using Fresh Fruit*, 20 pages, 1984.
    b. *Buying, Handling, and Using Fresh Vegetables*, 20 pages, 1984.

All available from:

National Restaurant Association
1200 Seventeenth Street, N.W.
Washington, DC 20039-3097
800-424-5156

Purchasing and Receiving
Unit 5

Answers to Assignment Sheets

Assignment Sheet 1

1. 1 case
2. 2 cases
3. 1 case
4. 1 case
5. 1 case
6. 1 box
7. 1 case
8. 3 cases
9. 1 case
10. 1 sack
11. 2 sacks
12. 1 case

Assignment Sheet 2

1. 9#10
2. 0
3. 4 2# boxes
4. 10#
5. 9#10
6. 3 gal.
7. 0
8. 0
9. 0
10. 83 count
11. 11#
12. 10

Assignment Sheets 3, 4, and 5—Evaluated according to the stated criteria.

Purchasing and Receiving
Unit 5

Answers to Written Test

1. a. 7
   b. 10
   c. 12
   d. 15
   e. 3
   f. 2
   g. 6
   h. 9
   i. 1
   j. 4
   k. 11
   l. 14

2. a, d, f

3. a. F
   b. I
   c. F
   d. I
   e. I
   f. F

4. a. Spot
   b. Cost-plus

5. a. 2
   b. 4
   c. 5
   d. 1
   e. 6
   f. 3

6. a. 3
   b. 1
   c. 2

7. a, b, d, f

8. a. Minimum
   b. Purveyors
   c. Eliminates
   d. Bookkeeper

9. a, c, d

Answers to Written Test

10. a. Weigh it
    b. Unit
    c. Open it
    d. Specifications

11. a. 1　　e. 2
    b. 6　　f. 3
    c. 7　　g. 5
    d. 4

12. a, b, d

13. a. Poultry
    b. State
    c. 0°F
    d. Thawing

14. a, b

15. a. Or
    b. 45°F
    c. Shelf life

16. a, c

17. a. Refrigerated
    b. Cleanliness
    c. Expiration
    d. Pasteurization

Purchasing and Receiving
Unit 5

Written Test

Name ______________________________ Score ______________

1. Match the terms on the right with their correct definitions.

______a. Type of market that serves as a centralized distribution center

______b. A product of agriculture

______c. Type of market that receives, stores, and distributes products from secondary markets to local and area users

______d. Written form used by receiving department to notify purveyor when merchandise is returned, when an order is short by weight or count, or when prices are incorrect and a credit needs to be issued

______e. Written request for goods which lists item specifications such as type, quantity, quality, and date needed

______f. A record of all goods on hand

______g. A company or person that sells and delivers supplies at a marked up price

______h. An itemized statement of goods purchased and their costs

______i. Maximum time that perishables can be stored under refrigeration

______j. Foods that spoil quickly and must be refrigerated

______k. A detailed description of a food product by grade, size, type, and quality required by a given food operation

______l. Governing agency covering production, manufacture and distribution of food involved in interstate commerce

1. Shelf life
2. Inventory
3. Purchase order
4. Perishables
5. Staples
6. Purveyor
7. Secondary market
8. Primary market
9. Invoice
10. Commodity
11. Specifications
12. Local market
13. USDA
14. FDA
15. Credit memo

Written Test

2. Select true statements concerning techniques for working with salespeople by placing an "X" in the appropriate blanks.

______a. Maintain a friendly business relationship.

______b. Give preferential treatment to some salespeople.

______c. Accept the third quote as the lowest price.

______d. Dismiss any salesperson who uses questionable tactics.

______e. Do not limit the number of salespeople you see.

______f. Set aside the allotted amount of time necessary to see salespeople.

3. Distinguish between basic methods of purchasing by placing an "I" for informal buying and an "F" for formal buying to the left of the method.

______a. Based on competitive bidding by sellers

______b. Uses quotation-and-order-sheet method

______c. Bids opened at an announced time and lowest and best bidder wins

______d. Purveyor prices are recorded on a purchase order and order is placed

______e. Orders specifying quantity and quality are called to purveyors

______f. Set up on a contract basis specifying billing, delivery, and terms of payment, and all is in writing

4. Complete the following statements concerning optional methods of purchasing by circling the correct words.

   a. (Cost-plus, Spot) buying occurs when there is an extreme product shortage in the market and the buyer must order a product without knowing the price.

   b. (Cost-plus, Spot) buying occurs when the market is unstable and the buyer is charged a basic cost plus a set markup.

Written Test

5. Arrange in order the following steps in purchasing by numbering from one to six.

______a. Determine amounts called for in recipes.

______b. Use estimated purchasing guides.

______c. Determine amount needed by subtracting amount on hand from amount required.

______d. Establish quality standards.

______e. Increase purchase order to full case or lot as required.

______f. Determine the amount in inventory.

6. Match quality standards on the right with their applications.

______a. Commodities such as fruit and vegetables which do not have to be graded

______b. Commodities which may carry a USDA grade

______c. Commodities such as beef and poultry which must be inspected to comply with federal, state, or local requirements

1. Regulatory
2. Mandatory
3. Voluntary

7. Select from the following list the recommended information for food labels by placing an "X" in the appropriate blanks.

______a. Name of food item

______b. Name and address of packer, manufacturer, or distributor

______c. Contents by measurement (cups, tablespoons, etc.)

______d. Specific names of ingredients in order or amount

______e. Suggested recipes

______f. Terms "artificial" or "preservative" if present

______g. Endorsements by famous people

Written Test

8. Complete the following statements concerning functions of specifications by circling the correct words.

   a. Establishes (maximum, minimum) acceptable quality for all foods

   b. Provides (purveyors, managers) with knowledge of foods they must keep on hand

   c. (Causes, Eliminates) friction between purchasing and other departments

   d. Aids (bookkeeper, cook) in keeping proper records

9. Select true statements concerning functions of USDA grading by placing an "X" in the appropriate blanks.

   ______a. Assures that product has been processed under sanitary conditions

   ______b. Assures that meat products are labeled according to flavor

   ______c. Maintains quality standards in processing

   ______d. Assures integrity in labeling

10. Complete the following statements concerning the first rules of receiving by filling in the blanks.

    a. If purchased by weight, ______________________________

    b. If purchased by ______________________________, count it

    c. If purchased by case, ______________________________

    d. Check for compliance with ______________________________

11. Arrange in order the following steps in receiving by numbering from one to seven.

    ______a. Check to see if the products delivered agree with the invoice.

    ______b. Accept the merchandise by signing the invoice and returning a copy to the deliverer.

    ______c. Store or deliver to the proper place.

    ______d. List all items received on the daily receiving report.

______e. Inspect the merchandise to determine if it is in agreement with the purchase order and specifications.

______f. Tag all meats with date of receipt, weight, and other information needed to properly identify the delivery.

______g. Note any discrepancies between the purchase order, invoice, and/or actual merchandise delivered, and issue a credit memorandum if needed.

12. Select true statements concerning guidelines for receiving fresh produce by placing an "X" in the appropriate blanks.

______a. Inspect for kind, quantity, variety, grade, size, and packaging.

______b. Open containers and check for over or under ripeness.

______c. Inspect produce in warm area.

______d. Check the quantity by weight or count.

13. Complete the following statements concerning guidelines for receiving frozen foods by filling in the blanks.

a. Frozen food containing meat or ________________ should have a federal inspection stamp or an establishment number on each package.

b. If packer is not regulated by interstate commerce, plant should be under ________________ inspection.

c. Frozen food must be delivered at ________________ °F or under.

d. Check for signs of ________________ and refreezing.

14. Select true statements concerning guidelines for receiving poultry by placing an "X" in the appropriate blanks.

______a. Poultry from interstate sources must bear a USDA stamp or tag.

______b. Poultry from local sources should be under state inspection, picked, fully eviscerated, and clean.

______c. Quality poultry should have a shelf life of 5 days at 35°F.

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Written Test

15. Complete the following statements concerning guidelines for receiving meats by circling the correct words.

    a. Meat should have USDA inspection and grading stamp (and, or) inspection by an equally reliable state of local agency.

    b. Temperature in delivery truck should be checked to make sure temperature is below (45°F, 0°F) and that the truck is clean.

    c. (Shelf life, Grade) should be determined on basis of time since slaughter, temperature at holding plant, and initial bacterial condition.

16. Select true statements concerning guidelines for receiving pastries by placing an "X" in the appropriate blanks.

    ______a. Product should indicate it came from a reliable, inspected bakery.

    ______b. Perishable pastries should be delivered under 70°F and the delivery truck should be inspected for proper ventilation.

    ______c. Pastries delivered without wrappers, clean boxes, or single-use coverings should not be accepted.

    ______d. Pastries delivered in reused and soiled bun or pastry boxes should be accepted.

17. Complete the following statements concerning guidelines for receiving dairy products by circling the correct words.

    a. Dairy products must be delivered in (refrigerated, pressurized) trucks.

    b. Delivery truck and packaged products should be inspected for (appearance, cleanliness).

    c. (Delivery, Expiration) dates must be checked.

    d. Milk and milk products should have (homogenization, pasteurization) labels and should be rejected if above 40°F.

***Permission to duplicate this test is granted.**

Purchasing and Receiving
Unit 5

Unit Evaluation Form

Student Name ______________________________ Unit Rating __________

Assignment Sheet 1—Complete a Purchasing Chart to Show Amounts to Order Rating _____

Comments: ____

____

Assignment Sheet 2—Complete a Purchasing Chart to Show Amounts Needed Rating _____

Comments: ____

____

Assignment Sheet 3—Complete a Food Purchase Checklist Rating _____

Comments: ____

____

Assignment Sheet 4—Complete a Food Receiving Checklist Rating _____

Comments: ____

____

Assignment Sheet 5—Write Specifications for a Canned Food, a Fresh Food, and a Frozen Food Rating _____

Comments: ____

____

Written Test Scores

Pretest _____ Posttest _____ Other _____

Other ____

____

Teacher Signature ______________________________ Date __________

Student Signature ______________________________ Date __________

*Permission to duplicate this form is granted.

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Quotation and Order Sheet

QUOTATION AND ORDER SHEET

For use on ______________________ Delivery date ______________________

				Price Quotes			
				Vendors			
Specifications	Amount Needed	Amount On Hand	Amount To Order	I	II	III	IV

Food Service: Management, Unit 5
Teacher Page 17

TM 1

Purchase Order

PURCHASE ORDER

Purveyor's Name ______________________________

Address and Zip Code ______________________________

Delivery Date: ____________ Name of Operation ____________ Order No. ________

Account No. ________________ Page ______ of ______

Delivered To: ______________________________

Delivery Instructions:

Please send the following items

VIA ________________________

By ________________________

Size of Unit	Item	Quantity	Unit Price	Extended Price
			Page Total	
			Subtotal	
			Less Discount	
			Purchase Order Total	

Terms of payment ______________________________

Shipment received and verified by

____

(Name) (Date)

(Supplier) (Transportation) (Date)

Competitive Bid

INVITATION, BID, AND AWARD

Issued by
Manager
Rain Forest Restaurant

Address
1122 N.W. 50th Street
Oklahoma City, OKlahoma

Date________

Sealed bids in duplicate will be received at the above office until ________ ________________ 19______, for the items and in the quantities indicated for delivery on the dates indicated. Quantities indicated are approximate and may be reduced on instruction of the buyer. Increases up to 20 percent will be binding at the discretion of the buyer.

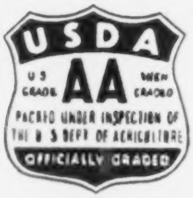
All items to be officially identified by the U.S. Department of Agriculture for class and quality. Costs of such service to be borne by vendor.

Items	Supplies	Quantity Unit	Unit Price	Amount
1.	Chicken, fresh chilled fryer, $2^{1}/_{2}$ - 3 lbs., ready-to-cook, U.S. Grade A To be delivered----------	500	lb.	
2.	Chicken, fresh chilled fowl, $3^{1}/_{2}$ - 4 lbs., ready-to-cook, U.S. Grade B To be delivered----------	100	lb.	
3.	Turkey, frozen, Young Tom 20-22 lbs., ready-to-cook, U.S. Grade A To be delivered----------	100	lb.	
4.	Ducks, frozen roaster duckling, 5 - $5^{1}/_{2}$ lbs., ready-to-cook, U.S. Grade A To be delivered----------	50	lb.	

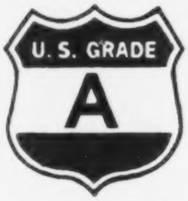
Vendor ______________________________

USDA Grades

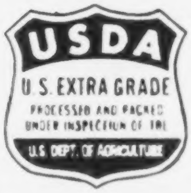
This is the USDA grade shield used on butter. It is printed on the carton and on the wrappers of quarter-pound sticks of butter.


USDA
U S GRADE
AA
WHEN GRADED
PACKED UNDER INSPECTION OF THE U S DEPT OF AGRICULTURE
OFFICIALLY GRADED

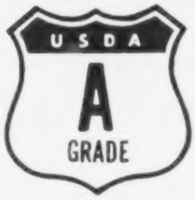
This U.S. grade name or grade shield may be used on canned, frozen, and dried fruits and vegetables. It is also used on a few related products like frozen concentrated juices, jams, and jellies.



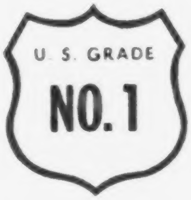
The U.S. Extra Grade name or shield may be used on instant nonfat dry milk. It means the milk has a sweet and pleasing flavor, and dissolves immediately when mixed with water.


USDA
U.S. EXTRA GRADE
PROCESSED AND PACKED UNDER INSPECTION OF THE
U.S. DEPT. OF AGRICULTURE

The USDA grade shield for eggs may be found on the carton.


USDA
A
GRADE

Although most fresh fruits and vegetables are sold at wholesale on the basis of U.S. grades, not many are marked with the grade in the grocery store.


U. S. GRADE
NO. 1

First Rules of Receiving

If Purchased by Weight,

— WEIGH IT.

If Purchased by Unit,

— COUNT IT.

If Purchased by Case,

— OPEN IT.

Check for Compliance

with Specifications.

Credit Memorandum

CREDIT MEMORANDUM

Operator's Name and Address

To: ______________________________ No. _______________

Address: _________________________

City, State: _______________________

To whom it may concern: Corrections have been made on your invoice as shown below.

Invoice No.	Item	Quantity	Unit of Sale	Unit Price	Extension
				Total	

Reason:

By: _______________

Title: _______________

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Purchasing and Receiving
Unit 5

Information Sheet

1. **Terms and definitions**

    a. **Commodity** — A product of agriculture

    b. **Credit memo** — Written form used by receiving department to notify purveyor when merchandise is returned, when an order is short by weight or count, or when prices are incorrect and a credit needs to be issued

    c. **FDA** — Food and Drug Administration; governing agency covering production, manufacture, and distribution of food involved in interstate commerce

    Note: Meat and poultry are not governed by this agency.

    d. **Inventory** — A record of all goods on hand

    e. **Invoice** — An itemized statement of goods purchased and their costs

    f. **Local market** — Type of market that receives, stores, and distributes products from secondary markets to local and area users

    g. **Perishables** — Foods that spoil quickly and must be refrigerated

    h. **Primary market** — Type of market that processes basic commodities in centralized locations and sets prices based on supply and demand

    Example: Chicago is a primary market for beef and pork

    i. **Purchase order** — Written request for goods which lists item specifications such as type, quantity, quality, and date needed

    j. **Purveyor** — A company or person that sells and delivers supplies at a marked up price

    k. **Secondary market** — Type of market that serves as a centralized distribution center

    Example: Kansas City is a secondary market for meat products

    l. **Shelf life** — Maximum time that perishables can be stored under refrigeration

    m. **Specifications** — A detailed description of a food product by grade, size, type, and quality required by a given food operation

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Information Sheet

n. **Staples** — Food items that keep indefinitely without refrigeration

Examples: Salt, pepper

o. **USDA** — United States Department of Agriculture

2. **Techniques for working with salespeople**

a. Maintain a friendly business relationship.

b. Do not give preferential treatment to anyone.

c. Accept the first quote given by a salesperson as the lowest price.

Note: Do not let a salesperson manipulate you by bargaining for the lowest price. Make it understood that the first quote is the only one which will be considered.

d. Dismiss any salesperson who uses questionable tactics.

e. Limit the number of salespeople you see.

f. Accept information from salespeople to update your knowledge.

g. Set aside the allotted amount of time necessary to see salespeople.

Note: This will prevent the loss of your valuable time.

3. **Basic methods of purchasing and their procedures**

a. **Informal buying**

(1) Uses quotation and order sheet

Figure 1

QUOTATION AND ORDER SHEET

For use on ______________________ Delivery date ______________________

				Price Quotes			
				Vendors			
Specifications	Amount Needed	Amount On Hand	Amount To Order	I	II	III	IV

Information Sheet

(2) Study prices and determine which purveyor to use.

(3) Orders specifying quantity and quality may be called or mailed to purveyors using purchase orders.

Figure 2

PURCHASE ORDER

Purveyor's Name ____________________

Address and Zip Code ____________________

Delivery Date: __________ Name of Operation __________ Order No. ______

Account No. __________ Page ____ of ____

Delivered To: ____________________

Delivery Instructions:

Please send the following items

VIA ____________________

By ____________________

Size of Unit	Item	Quantity	Unit Price	Extended Price

Page Total	
Subtotal	
Less Discount	
Purchase Order Total	

Terms of payment ____________________

Shipment received and verified by

____

(Name) (Date)

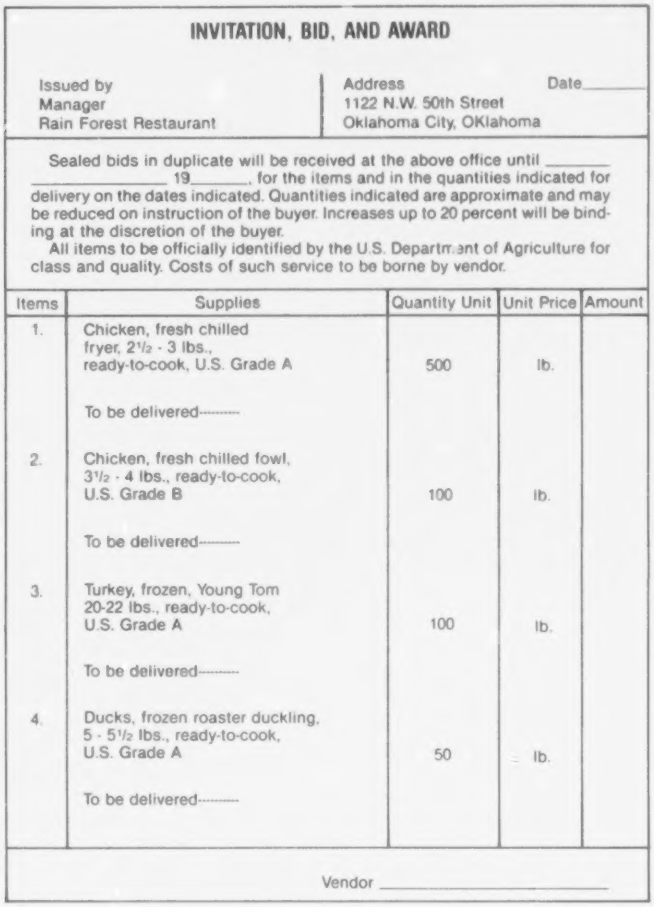
(Supplier) (Transportation) (Date)

Information Sheet

b. **Formal buying** (commonly used by institutional food services)

(1) Based on competitive bidding by sellers

Figure 3



INVITATION, BID, AND AWARD

Issued by Manager Rain Forest Restaurant	Address Date______ 1122 N.W. 50th Street Oklahoma City, OKlahoma

Sealed bids in duplicate will be received at the above office until ________ ______________ 19______, for the items and in the quantities indicated for delivery on the dates indicated. Quantities indicated are approximate and may be reduced on instruction of the buyer. Increases up to 20 percent will be binding at the discretion of the buyer.

All items to be officially identified by the U.S. Department of Agriculture for class and quality. Costs of such service to be borne by vendor.

Items	Supplies	Quantity Unit	Unit Price	Amount
1.	Chicken, fresh chilled fryer, $2\frac{1}{2}$ - 3 lbs., ready-to-cook, U.S. Grade A To be delivered--------	500	lb.	
2.	Chicken, fresh chilled fowl, $3\frac{1}{2}$ - 4 lbs., ready-to-cook, U.S. Grade B To be delivered--------	100	lb.	
3.	Turkey, frozen, Young Tom 20-22 lbs., ready-to-cook, U.S. Grade A To be delivered--------	100	lb.	
4.	Ducks, frozen roaster duckling, 5 - $5\frac{1}{2}$ lbs., ready-to-cook, U.S. Grade A To be delivered--------	50	lb.	

Vendor ______________________

(2) Set up on a contract basis specifying billing, delivery, and terms of payment, and all is in writing

(3) Bids opened at an announced time and lowest and best bidder wins

Note: When formal buying is not in writing but is conducted over the telephone, it is called negotiated buying.

Information Sheet

4. **Optional methods of purchasing**

   a. **Spot buying** — Occurs when there is an extreme product shortage in the market and the buyer must order a product without knowing the price

   Note: This is sometimes called the blank-check method.

   b. **Cost-plus buying** — Occurs when the market is unstable and the buyer is charged a basic cost plus a set markup

5. **Steps in purchasing**

   a. Establish quality standards.

   b. Determine amounts called for in recipes.

   c. Determine the amount in inventory.

   d. Use estimated purchasing guides.

   Example:
   1 head of lettuce = 6 to 8 servings
   1 #10 corn = 25 servings, 3-4 oz.
   25 lb. ground beef = 100 portions, 3 oz. (cooked)

   Note: These guides are readily available in quantity purchasing texts such as *Food for Fifty*.

   e. Determine amount needed by subtracting amount on hand from amount required.

   Example:
   3 cases of 6 #10 green beans (amount required)
   – 2 cases of 6 #10 green beans (on hand)
   = 1 case of 6 #10 green beans to purchase

   f. Increase purchase order to full case or lot as required.

   Note: Some purveyors will break a case or lot, but many will not.

   Example: If you need 3 #10 of carrots, you will probably have to order 1 case of 6 #10 carrots.

Information Sheet

6. Quality standards and their applications

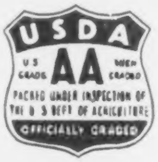
a. **Voluntary** — Commodities such as fruit and vegetables which do not have to be graded

b. **Mandatory** — Commodities such as beef and poultry which must be inspected to comply with federal, state, or local requirements

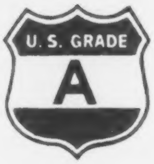
c. **Regulatory** — Commodities which may carry a USDA grade

Figure 4—USDA Grades

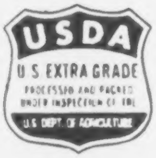
This is the USDA grade shield used on butter. It is printed on the carton and on the wrappers of quarter-pound sticks of butter.


USDA
U S GRADE
AA
WHEN GRADED
PACKED UNDER INSPECTION OF THE U S DEPT OF AGRICULTURE
OFFICIALLY GRADED

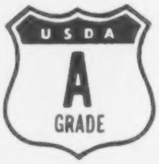
This U.S. grade name or grade shield may be used on canned, frozen, and dried fruits and vegetables. It is also used on a few related products like frozen concentrated juices, jams, and jellies.



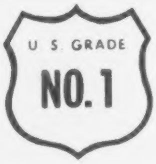
The U.S. Extra Grade name or shield may be used on instant nonfat dry milk. It means the milk has a sweet and pleasing flavor, and dissolves immediately when mixed with water.


USDA
U S EXTRA GRADE
PROCESSED AND PACKED UNDER INSPECTION OF THE
U.S. DEPT. OF AGRICULTURE

The USDA grade shield for eggs may be found on the carton.


USDA
A
GRADE

Although most fresh fruits and vegetables are sold at wholesale on the basis of U.S. grades, not many are marked with the grade in the grocery store.


U S GRADE
NO. 1

Information Sheet

7. **Recommended information for food labels**

   a. Name of food item

   b. Name and address of packer, manufacturer, or distributor

   c. Contents by weight

   d. Specific names of ingredients in order or amount

   e. All dietary claims

   Examples: "No sugar added," "Salt free," "Packed in water"

   f. Terms "artificial" or "preservative" if present

   g. Must state if product does not meet standard established by government.

8. **Functions of specifications**

   a. Establishes minimum acceptable quality for all foods

   b. Provides purveyors with knowledge of foods they must keep on hand

   c. Eliminates friction between purchasing and other departments

   d. Aids bookkeeper in keeping proper records

   Example: Asparagus, canned, all green stalks or spears
   10 cases
   U.S. Fancy or Grade A
   24/2's
   Quote price per case
   Style shall be stalks no more then 3¼ inches in length; minimum drained weight shall be not less than 12 ounces; size of spears shall be extra large (mammoth). Pack shall be from current stocks. Inspector's certification of grade shall accompany invoice; all cases shall be marked with the certificate number.

9. **Functions of USDA grading**

   a. Assures that product has been processed under sanitary conditions

   b. Assures that meat products are labeled according to grade

   c. Maintains quality standards in processing

   d. Assures integrity in labeling

Information Sheet

10. The first rules of receiving

a. If purchased by weight, weigh it.

b. If purchased by unit, count it.

c. If purchased by case, open it.

d. Check for compliance with specifications.

11. Steps in receiving

a. Check to see if the products delivered agree with the invoice.

b. Inspect the merchandise to determine if it is in agreement with the purchase order and specifications.

c. Tag all meats with date of receipt, weight, and other information needed to properly identify the delivery.

d. List all items received on the daily receiving report.

e. Note any discrepancies between the purchase order, invoice, and/or actual merchandise delivered, and issue a credit memorandum if needed.

Figure 5

CREDIT MEMORANDUM

Operator's Name and Address

To: ______________________ No. __________

Address: ____________________

City, State: __________________

To whom it may concern: Corrections have been made on your invoice as shown below.

Invoice No.	Item	Quantity	Unit of Sale	Unit Price	Extension
				Total	

Reason:

By: ____________

Title: ____________

Information Sheet

- f. Accept the merchandise by signing the invoice and returning a copy to the deliverer.
- g. Store or deliver to the proper place.

12. **Guidelines for receiving fresh produce**
    - a. Inspect for kind, quantity, variety, grade, size, and packaging.
    - b. Open containers and inspect for over or under ripeness.
    - c. Inspect in refrigerated area so that the produce does not become warm.
    - d. Check the quantity by weight or count.

13. **Guidelines for receiving frozen foods**
    - a. Frozen food containing meat or poultry should have a federal inspection stamp or an establishment number on each package.
    - b. If packer is not regulated by interstate commerce, plant should be under state inspection.
    - c. Frozen foods must be delivered at 0°F or under.
    - d. Check for signs of thawing and refreezing.

14. **Guidelines for receiving poultry**
    - a. Poultry from interstate sources must bear a USDA stamp or tag.
    - b. Poultry from local sources should be under state inspection, picked, fully eviscerated, and clean.

      Note: Eviscerated means that the organs have been removed.
    - c. Quality poultry should have a shelf life of 40 hours at 35°F.

15. **Guidelines for receiving meats**
    - a. Meat should have USDA inspection and grading stamp or inspection by an equally reliable state or local agency.
    - b. Temperature in delivery truck should be checked to make sure temperature is below 45°F and that the truck is clean.
    - c. Shelf life should be determined on basis of time since slaughter, temperature at holding plant, and initial bacterial condition.

Information Sheet

16. **Guidelines for receiving pastries**

    a. Product should indicate it came from a reliable, inspected bakery.

    b. Perishable pastries should be delivered under 45°F and the delivery truck should be inspected for cleanliness.

    c. Pastries delivered without wrappers, clean boxes, or single-use coverings should not be accepted.

    d. Pastries delivered in reused and soiled bun or pastry boxes should not be accepted.

17. **Guidelines for receiving dairy products**

    a. Dairy products must be delivered in refrigerated trucks.

    b. Delivery truck and packaged products should be inspected for cleanliness.

    c. Expiration dates must be checked.

    d. Milk and milk products should have pasteurization labels and should be rejected if above 40°F.

    e. Milk intended for use as a beverage should be packaged in individual containers.

Purchasing and Receiving
Unit 5

Assignment Sheet 1—Complete a Purchasing Chart to Show Amounts to Order

Name ______________________ Overall Rating ________

Evaluation criteria	**Rating**
Answers are correct	______

Directions: Complete the following chart using the information given. Order by the pack size. No broken packs can be ordered.

AMOUNT REQUIRED	PACK	AMOUNT TO ORDER
1. 3 #10 of green beans	6/#10 case	
2. 9 #10 corn	6/#10 case	
3. 9# corn	20# case	
4. 3½ #10 carrots	6/#10 case	
5. 6 2# box broccoli	12/2# box case	
6. 23# ground beef	25# box	
7. 3 #10 mixed vegetables	6/#10 case	
8. 14 #10 beets	6/#10 case	
9. 2 #10 peppers	6/#10 case	
10. 9# flour	25# sack	
11. 33# corn meal	20# sack	
12. 12 heads lettuce	24 head case	

Purchasing and Receiving
Unit 5

Assignment Sheet 2—Complete a Purchasing Chart to Show Amounts Needed

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are correct	______

Directions: Complete the following chart using the information given.

ITEM	AMOUNTS REQUIRED	AMOUNT ON HAND	AMOUNT NEEDED
1. Corn	12 #10	3 #10	
2. Green beans	3 #10	3 #10	
3. Broccoli	10 2# boxes	6 2# boxes	
4. Green peas	20#	10#	
5. Carrots	9 #10	None	
6. Milk	9 gal.	6 gal.	
7. Corn meal	3#	6#	
8. Flour	3 oz.	1#	
9. Frozen corn	40#	60#	
10. Corn on cob	96 count	13 count	
11. Ground beef	20#	9#	
12. Chicken	10	None	

Purchasing and Receiving
Unit 5

Assignment Sheet 3—Complete a Food Purchase Checklist

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Student has made proper arrangements for visit	______
Checklist is complete	______
Summary is neat, well-written, and complete	______

Directions: Arrange with your instructor to visit a local restaurant or vo-tech food service department. On the appointed day, introduce yourself, and explain the purpose of your visit. Then complete the following food purchase checklist. Write a summary of your visit on the back of the checklist or on a separate sheet of paper. Attach separate summary to this checklist.

Name of Business ______________________________ Date ______________

FOOD PURCHASING CHECKLIST

Yes	No	N/A	**Meat and Poultry**
			Are specifications used in purchasing meat?
			Is meat graded by fat content or other quality standards?
			Are specifications used in purchasing poultry?
			Is poultry purchased (circle one) whole or cut?
			Are bids received from at least two purveyors?
			Does one purveyor get entire meat order?
			Are meat and poultry products delivered daily?
			If not delivered daily, is there a price break on deliveries twice or three times a week?
Yes	No	N/A	**Fresh Fruit and Vegetables**
			Does frequency of delivery assure fresh produce?
			Does the restaurant place the order or does the purveyor call and ask for the order? (Circle one)
			Does the restaurant have any doubts about the integrity of its purveyors?
			Does the restaurant use its own food purchasing checklist?

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Purchasing and Receiving
Unit 5

Assignment Sheet 4—Complete a Food Receiving Checklist

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Student has made proper arrangements for visit	______
Checklist is complete	______
Summary is neat, well-written, and complete	______

Directions: Arrange with your instructor to visit a local restaurant or vo-tech food service department on delivery day. On the appointed day, introduce yourself, and explain the purpose of your visit. Then complete the following food receiving checklist. Write a summary of your visit on the back of the checklist or on a separate sheet of paper. Attach separate summary to this checklist.

Name of Business ______________________________ Date ______________

Yes	No	N/A	FOOD RECEIVING CHECKLIST
			Are items to be received written on an invoice showing quantity, price, and extension?
			Are all items in good sanitary condition?
			Are refrigerated items stored immediately?
			Are goods weighed or counted? (Circle one)
			Are weights and counts the same as on invoice?
			Are cased goods securely sealed?
			Are meat and poultry cases or wrappings subtracted from gross weight?
			Are portions of deliveries often returned for credit?
			Are cartons of oranges, melons, and strawberries turned to check for consistent quality?
			Does invoice specify a point of delivery such as back dock, storeroom, refrigerator, or basement?
			Is the delivery person allowed to enter the storeroom, walk-in refrigerator, or freezer?
			Is a credit memorandum completed when merchandise is returned, or is the invoice corrected?
			Does the restaurant use its own food receiving checklist?

Purchasing and Receiving
Unit 5

Assignment Sheet 5—Write Specifications for a Canned Food, a Fresh Food, and a Frozen Food

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Specifications are complete and clear	______

Directions: Using specifications for canned, fresh, and frozen foods provided by your instructor and the following guidelines, write specifications for a canned food, a fresh food, and a frozen food.

Guidelines

Certain information should be included in all specifications:

1. The common or usual trade name of the product
2. The recognized federal, trade, or commonly accepted local grade
3. The unit or container on which the price is quoted
4. The name and size of the basic container

Additional information often needed is:

5. The count and size of items or units in the container
6. The weight ranges
7. Minimum or maximum
8. The type of processing and packaging
9. The degree of ripeness
10. Additional information that would eliminate any possibility of misunderstanding

Example: Canned Food

Product	Peaches
Variety	Clingstone
Style	Halves
Count	35/40
Pack	6/10
Dry Weight Minimum	67.1 oz.
Pack Medium	Light Syrup
Grade	U.S. Choice

Assignment Sheet 5

Canned Food:

Fresh Food:

Frozen Food:

Storing and Issuing
Unit 6

Objective Sheet

Unit Objective

After completing this unit, the student should be able to identify storage areas and appropriate procedures, prepare storeroom requisitions, and complete a physical inventory and security checklist. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Match terms related to storing and issuing with their correct definitions.
2. Distinguish among categories of storage.
3. Complete statements concerning dry storage practices and procedures.
4. Select true statements concerning refrigerated storage practices and procedures.
5. Match foods with their recommended refrigerated storage maximums.
6. Select true statements concerning frozen storage practices and procedures.
7. Match foods with their maximum frozen storage periods.
8. Complete statements concerning procedures for storage control.
9. List reasons for keeping good inventories.
10. Complete statements concerning procedures for controlling inventories.
11. Arrange in order the essential steps in taking an inventory.
12. Complete a list of inventory information requirements.
13. Select true statements concerning guidelines for issuing.
14. Complete statements concerning guidelines for security control.
15. Identify proper storage areas for given foods and nonfood items. (Assignment Sheet 1)

Objective Sheet

16. Prepare storeroom requisitions. (Assignment Sheet 2)

17. Complete a physical inventory. (Assignment Sheet 3)

18. Complete a food service security checklist. (Assignment Sheet 4)

Storing and Issuing
Unit 6

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.

2. Review Teaching Suggestions section that follows. Plan for classroom activities.

3. Plan for enrichment of exceptional students as well as accommodation of special needs students.

4. Develop teaching plan. Adjust for different learning styles.

5. Make copies of Unit Evaluation Form.

Delivery and Application

6. Provide students with unit of instruction.

7. Discuss unit and specific objectives.

8. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.

9. Discuss the assignment sheets. Review criteria for evaluation of these activities.

Evaluation

10. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.

11. Make copies of the written test. Add or modify test questions as needed.

12. Give written test.

13. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.

14. Reteach and retest as required.

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Suggested Activities

Teaching Suggestions

Note: Skill areas appearing in bold face type in the Teaching Suggestions refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Invite a storeroom clerk or supervisor to talk to the class about the types of tools and equipment required for proper storage. (**Communication skills**)
2. Review storage procedures for fresh meat and poultry, fish, fruit, and vegetables.
3. Obtain damaged food items from a purveyor and talk to the class about the control procedure for damaged foods.
4. Make proper arrangements with local vo-tech food service department for students to take inventories as required in Assignment Sheet 3.
5. Emphasize the importance of keeping good inventories and how poor inventory control can affect profit.
6. To reinforce objectives 3 and 4, have students check dry and refrigerated storage practices at home. Then, as a class activity, have students identify existing problems and discuss possible solutions. (**Oral communication, listening,** and **problem solving**)

Resources Used in Developing This Unit

1. Gibson, LeRoy. *Food Production, Management, and Services: Production*, 2nd ed. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1992.
2. Knight, John and Lendal Kotschevar. *Quantity Food Production, Planning, and Management*, 2nd ed. New York: Van Nostrand Reinhold, 1988.
3. Kotschevar, Lendal. *Standards, Principles, and Techniques in Quantity Food Production*, 4th ed. New York: Van Nostrand Reinhold, 1988.
4. Morgan, William J. Jr. *Supervision and Management of Quantity Food Preparation*, 3rd ed. Berkeley, CA: McCutchan Publishing Corp.
5. Warfel, M. and Waskey, F. *The Professional Food Buyer*. Berkeley, CA: McCutchan Publishing Corp., 1979.

Storing and Issuing
Unit 6

Answers to Assignment Sheets

Assignment Sheet 1

N	Aluminum foil
R	Apples, fresh
R	Avocados
R	Bacon
D	Baking powder
D	Beans, ranch style
R	Beef tips
R	Bologna
D	Bread
F	Broccoli, frozen
R	Carrots, fresh
R	Cheese, American
D	Cinnamon
D	Coffee
D	Cornstarch
R	Cottage cheese
D	Crackers
N	Detergent
R	Eggplant
R	Eggs
D	Flour
D	French dressing
D	Fruit cocktail
R	Ham
D	Instant potato flakes
D	Ketchup
R	Lettuce
D	Macaroni
R	Margarine
D	Marshmallows
D	Milk, powdered
D	Mushrooms, canned
D	Mustard, prepared
N	Napkins, paper
D	Oil, vegetable
F	Onion rings, frozen
R	Onions, yellow
R	Oranges
R	Parsley
R	Pecan pies
D	Pickles
N	Plastic film wrap
R	Potatoes, russet
D	Rice
N	Scouring powder
F	Shrimp, frozen
D	Soup base
D	Sugar
D	Vinegar
D	Yeast, dry

Assignment Sheet 2

A.

	Extension
Potatoes	$ 4.80
Salad oil	11.15
Lettuce	2.45
Parsley	.63
Frozen corn	6.80
Eggs	7.11
Whole tomatoes	7.38
Total:	$40.32

B.

	Extension
Butter	$ 7.04
Salt	.32
Green onions	.92
Frozen peas	5.40
Tomatoes	2.70
Corn starch	2.15
Peaches	15.68
Total	$34.21

C.

	Extension
Tuna fish	$10.88
Apples	2.94
Margarine	2.36
Sliced pineapple	9.54
Cherries	9.20
Celery	1.20
Total:	$36.03

D.

	Extension
Carrots	$ .44
Salmon	11.61
Lima beans	4.75
Fresh mushrooms	3.63
Romaine lettuce	2.94
Total	$23.37

Answers to Assignment Sheets

E.

	Extension
Cake flour	$ 7.90
Egg noodles	1.60
Green beans	3.00
Coffee	4.00
Mixed vegetables	11.40
Eggs	3.95
Total:	$31.85

Assignment Sheet 3—Evaluated according to the stated criteria. Students' answers will vary according to location surveyed and inventory items selected.

Assignment Sheet 4—Answers may vary. Use for discussion.

1. A, B, C
2. C
3. D
4. D
5. A, B, C
6. D
7. D
8. A, B
9. A
10. A
11. A
12. D
13. A
14. A
15. A, B, C
16. D
17. A, B, C
18. A, B, C
19. A, B, C
20. A, B, C

Storing and Issuing
Unit 6

Answers to Written Test

1. a. 5
   b. 3
   c. 6
   d. 8
   e. 7
   f. 1
   g. 4
   h. 2

2. a. F
   b. N
   c. D
   d. R

3. a. Well-lit, cool
   b. Inspect for
   c. As soon as possible
   d. Together
   e. All
   f. Oldest
   g. Frequent
   h. Cans

4. a, c, e

5. a. 5
   b. 2
   c. 3
   d. 2
   e. 1
   f. 3
   g. 3
   h. 4
   i. 3
   j. 2 or 3
   k. 1

6. b, c, e

7. a. 3
   b. 3
   c. 2
   d. 3
   e. 1

8. a. Date
   b. FIFO
   c. Low
   d. Inventory

Answers to Written Test

9. Any three of the following:
   a. Keeps track of food used and indicates the rate of use
   b. Indicates replacement quantities for purchasing
   c. Indicates type and size of foods on hand
   d. Indicates dollar value of stock on hand
   e. Indicates pilferage problems

10. a. Locked
    b. Daily
    c. Frequently
    d. Frequently
    e. Daily

11. a. 3
    b. 2
    c. 1

12. b. Location
    d. Physical inventory

13. a, d

14. a. One access
    b. Only authorized people
    c. Requisitions
    d. Spot

Storing and Issuing
Unit 6

Written Test

Name ______________________________ Score ______________

1. Match the terms on the right with their correct definitions.

   _____a. First in, first out; used as a guideline to assure that foods will be used in proper order

   _____b. A record of goods on hand

   _____c. A written request for supplies to be obtained from storage

   _____d. Foods susceptible to invasion by bacteria, molds, yeasts, and spoilage unless correctly stored

   _____e. Basic food items that keep indefinitely without refrigeration

   1. Requisition
   2. Staples
   3. FIFO
   4. Perishables
   5. Inventory

2. Distinguish among the categories of storage by placing the correct letters next to the appropriate descriptions.

   D—Dry storage

   F—Frozen storage

   N—Nonfood storage

   R—Refrigerated storage

   _____a. Storage at 0°F to −10°F; used for ice cream

   _____b. Storage at room temperature; used for cleaning supplies and paper goods

   _____c. Storage at room temperature; used for staples and canned goods

   _____d. Storage at 32°F to 40°F; used for perishable foods

Written Test

3. Complete the following statements concerning dry storage practices and procedures by circling the correct words.

   a. Keep storeroom clean, (well-lit, dark), well-ventilated, dry, and (cool, warm). *(2 answers required)*

   b. (Ask delivery person about, Inspect for) damage, infestation, or spoilage.

   c. Place food in the storeroom (within one week, as soon as possible) after receiving.

   d. Stack foods of like kind (separate, together) to ensure good storeroom organization.

   e. Date (some, all) packages.

   f. Place (newest, oldest) stock in front and use it first (FIFO).

   g. Take (frequent, infrequent) inventory.

   h. Check frequently for evidence of spoilage, broken or torn packages, and leaking or bulging (boxes, cans).

4. Select true statements concerning refrigerated storage practices and procedures by placing an "X" in the appropriate blanks.

   ______a. Inspect all deliveries before storing them.

   ______b. Put food into units whenever you get a chance.

   ______c. Place only perishable foods in the units.

   ______d. Do not remove outside wrappings.

   ______e. Cover processed foods and carry-overs.

   ______f. Store foods with strong odors in open containers.

   ______g. Store food on the floor of a refrigeration unit.

   ______h. Place warm foods on shelf near other food items.

Written Test

5. Match the foods below with their recommended refrigerated storage maximums.

______a. Cheddar cheese
______b. Cottage cheese
______c. Bacon
______d. Whole chicken and turkey
______e. Fish
______f. Fluid milk
______g. Hot dogs
______h. Butter
______i. All vegetables
______j. Roasts and steaks
______k. Ground meat

1. 1 to 2 days
2. 3 days
3. 5 to 7 days
4. 10 days
5. 30 days

6. Select true statements concerning frozen storage practices and procedures by placing an "X" in the appropriate blanks.

______a. Maintain temperatures of 20°F or less.
______b. Never refreeze foods that have thawed.
______c. Insist that frozen items are still completely frozen when delivered.
______d. Place new stock in front to use first (FIFO).
______e. Keep records of delivery dates so maximum storage periods will not be exceeded.

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Written Test

7. Match the foods below with their maximum frozen storage periods.

______a. Lamb and veal
______b. Fruits and vegetables
______c. Fresh pork, not ground
______d. Beef, poultry, and eggs
______e. Sausage, ground meat, and fish

1. 1 to 3 months
2. 3 to 6 months
3. 6 to 12 months

8. Complete the following statements concerning procedures for storage control by filling in the blanks.

   a. Receive deliveries, check them into storage, and tag or mark them with ________________ received and price paid.

   b. Use an orderly rotation that promotes ______________.

   c. Inform responsible parties when stocks are ________________ or there is any storage problem.

   d. Maintain accurate ________________.

9. List three reasons for keeping good inventories.

   a. ____

   b. ____

   c. ____

10. Complete the following statements concerning procedures for controlling inventories by circling the correct words.

    a. Keep storerooms (locked, open).

    b. Check refrigerator temperatures (weekly, daily).

    c. Check orders (frequently, occasionally).

    d. Check inventory (once a month, frequently).

    e. Check freezers (daily, weekly).

Written Test

11. Arrange in order the essential steps in taking an inventory by numbering from one to three.

_______a. Make the correct extension.

_______b. Use the correct price.

_______c. Make an accurate count.

12. Complete the following list of inventory information requirements.

a. Department

b. _______________________________

c. Date

d. _______________________________

(1) Item
(2) Pack
(3) Quantity
(4) Price
(5) Extension

13. Select true statements concerning guidelines for issuing by placing an "X" in the appropriate blanks.

_______a. Regular issuing hours should be maintained.

_______b. Departments should know their weekly needs in advance.

_______c. Storage should be locked when there is an attendant on duty.

_______d. Supplies should not be issued without a requisition.

14. Complete the following statements concerning guidelines for security control by circling the correct words.

a. Have only (one access, two accesses) through which everything and everyone must enter and exit.

b. Admit (everyone, only authorized people) to the storeroom.

c. Honor only those (credits, requisitions) signed by authorized people.

d. Make (spot, thorough) checks of food stocks.

***Permission to duplicate this test is granted.**

Storing and Issuing
Unit 6

Unit Evaluation Form

Student Name ________________________ Unit Rating ____________

Assignment Sheet 1—Identify Proper Storage Areas for Given Foods and Nonfood Items Rating ______

Comments: ____

____

Assignment Sheet 2—Prepare Storeroom Requisitions Rating ______

Comments: ____

____

Assignment Sheet 3—Complete a Physical Inventory Rating ______

Comments: ____

____

Assignment Sheet 4—Complete a Food Service Security Checklist Rating ______

Comments: ____

____

Written Test Scores

Pretest ______ Posttest ______ Other ______

Other ____

____

Teacher Signature ________________________ Date ____________

Student Signature ________________________ Date ____________

*Permission to duplicate this form is granted.

Storing and Issuing
Unit 6

Information Sheet

1. **Terms and definitions**

    a. **FIFO** — First in, first out; used as a guideline to assure that foods will be used in proper order

    b. **Inventory** — A record of goods on hand

    c. **Perishables** — Foods susceptible to invasion by bacteria, molds, yeasts, and spoilage unless correctly stored

    Note: Even if properly stored, these foods will eventually perish.

    d. **Requisition** — A written request for supplies to be obtained from storage

    e. **Staples** — Basic food items that keep indefinitely without refrigeration

2. **Categories of storage** (Assignment Sheet 1)

    a. **Dry storage**

        (1) Storage at room temperatures

        (2) Used for staples and canned goods

    b. **Refrigerated storage**

        (1) Storage at temperature range of 32°F to 40°F

        (2) Used for perishable foods such as produce, meat, poultry, fish, and dairy products

    c. **Frozen storage**

        (1) Storage at temperature range or 0°F to –10°F

        (2) Used for foods that must be kept frozen such as ice, ice cream, frozen vegetables, and meats to be kept for longer periods of time

    d. **Nonfood storage**

        (1) Storage at room temperature away from food products

        (2) Used for cleaning supplies and paper goods

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Information Sheet

3. Dry storage practices and procedures

a. Keep storeroom clean, well-lit, well-ventilated, dry, and cool.

b. Inspect all shipments for damage, infestation, or spoilage.

c. Place food in the storeroom as soon as possible after receiving.

d. Stack foods of like kind together to ensure good storeroom organization.

e. Date all packages.

f. Place oldest stock in front and use it first (FIFO).

g. Take frequent inventory.

h. Check frequently for evidence of spoilage, broken or torn packages, and leaking or bulging cans.

4. Refrigerated storage practices and procedures

a. Inspect all deliveries before storing them.

b. Put food into units as quickly as possible.

c. Use shelves at bottom third of refrigerator nearest the cooling unit for the most perishable items such as milk, meat, and fish.

d. Place only perishable foods in the units.

e. Remove outside wrappings.

f. Cover processed foods and carry-overs.

g. Store foods with strong odors in tight containers.

h. Do not store food on the floor of a refrigeration unit.

i. Place warm foods such as cooked dishes on shelf away from other food items.

5. Foods and their recommended refrigerated storage maximums

a. Roasts and steaks--3 to 5 days

b. Ground meat—1 to 2 days

c. Whole cured ham—3 to 5 days

Information Sheet

- d. Hot dots—7 days
- e. Bacon—7 days
- f. Whole chicken and turkey—3 days (iced)
- g. Cut-up poultry—1 to 2 days (iced)
- h. All fish—1 to 2 days (iced)
- i. Fluid milk—5 to 7 days
- j. Butter—10 days
- k. Cheddar cheese—30 days
- l. Cottage cheese—3 days
- m. All vegetables—5 days average

6. **Frozen storage practices and procedures**
   - a. Maintain temperature of 0°F or less.
   - b. Never refreeze foods that have thawed.
   - c. Insist that frozen items are still completely frozen when delivered.
   - d. Place old stock in front to use first (FIFO).
   - e. Keep records of delivery dates so maximum storage periods will not be exceeded.

7. **Foods and their maximum frozen storage periods**
   - a. Sausage, ground meats, and fish—1 to 3 months
   - b. Fresh pork, not ground—3 to 6 months
   - c. Lamb and veal—6 to 9 months
   - d. Beef, poultry, and eggs—6 to 12 months
   - e. Fruits and vegetables—1 year maximum

Information Sheet

8. **Procedures for storage control**

   a. Receive deliveries, check them into storage, and tag or mark them with date received and price paid.

   b. Maintain clean facilities.

   c. Use an orderly rotation that promotes FIFO.

   d. Inform responsible parties when stocks are low or there is any storage problem.

   e. Maintain accurate inventory.

9. **Reasons for keeping good inventories**

   a. Keeps track of food used and indicates the rate of use

   b. Indicates replacement quantities for purchasing

   c. Indicates type and size of foods on hand

   d. Indicates dollar value of stock on hand

   e. Indicates pilferage problems

10. **Procedures for controlling inventories**

    a. Keep storerooms locked.

    b. Check refrigerator temperatures daily.

    c. Check orders frequently.

    d. Check production sheets frequently.

    e. Check inventory frequently.

    f. Check freezers daily.

Information Sheet

11. **Essential steps in taking inventory** (Assignment Sheets 2 and 3)

    a. Make an accurate count.

    b. Use the correct price.

    c. Make the correct extension.

    Note: Remember that an extension equals quantity of food times unit price.

    Example: 1 #10 of corn (no extension required) = $1.60
    3 #10 of corn extended = $4.80

12. **Inventory information requirements** (Assignment Sheet 3)

    a. Department

    b. Location

    c. Date

    d. Physical inventory

        (1) Item
        (2) Pack

        Examples: 20#, 6# 10, dozen, gallon, count

        (3) Quantity
        (4) Price
        (5) Extension

13. **Guidelines for issuing**

    Note: These are used by very high volume food services and are not often found in medium to low volume operations.

    a. Regular issuing hours should be maintained.

    b. Departments should know their daily needs in advance.

    c. Storage should be locked when there is no attendant on duty.

    d. Supplies should not be issued without a requisition.

Information Sheet

14. **Guidelines for security control** (Assignment Sheet 4)

    a. Give storeroom keys only to authorized people.

    b. Have only one access through which everything and everyone must enter and exit.

    c. Admit only authorized people to the storeroom.

    d. Honor only those requisitions signed by authorized people.

    e. Make spot checks of food stocks.

Storing and Issuing
Unit 6

Assignment Sheet 1—Identify Proper Storage Areas For Given Foods and Nonfood Items

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Foods and nonfoods are assigned to correct storage areas	______

Directions: Identify the proper storage areas for the following foods and nonfood items. Place one of the following letters in the appropriate blanks.

D—Dry storage
F—Frozen storage
N—Nonfood storage
R—Refrigerated storage

______Aluminum foil
______Apples, fresh
______Avocados
______Bacon
______Baking powder
______Beans, ranch style
______Beef tips
______Bologna
______Bread
______Broccoli, frozen
______Carrots, fresh
______Cheese, American
______Cinnamon
______Coffee
______Cornstarch
______Cottage cheese
______Crackers
______Detergent
______Eggplant
______Eggs
______Flour
______French dressing
______Fruit cocktail
______Ham
______Instant potato flakes
______Ketchup
______Lettuce
______Macaroni
______Margarine
______Marshmallows
______Milk, powdered
______Mushrooms, canned
______Mustard, prepared
______Napkins, paper
______Oil, vegetable
______Onion rings, frozen
______Onions, yellow
______Oranges
______Parsley
______Pecan pies
______Pickles
______Plastic film wrap
______Potatoes, russet
______Rice
______Scouring powder
______Shrimp, frozen
______Soup base
______Sugar
______Vinegar
______Yeast, dry

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Storing and Issuing
Unit 6

Assignment Sheet 2—Prepare Storeroom Requisitions

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are correct	______

Directions: Study the following example and use it as a guideline to complete the five requisitions that follow.

Example:

No.	Unit	Description	Unit Price	Extension
6	#10	Peach halves	$1.50	$9.00
4	#10	Orange juice	1.50	6.00
1	lb.	Fresh oranges	1.25	1.25
2	lb.	Sugar	.25	.50
4	lb.	Flour	.20	.80

Total: $17.55

Problem A: 20 lbs. of Idaho potatoes @ .24 per lb.
5 gallons salad oil @ 2.23 per gal.
5 heads lettuce @ .49 per head
3 bunches parsley at .21 per bunch
8 2¼ lb. boxes frozen corn @ .34 per lb.
9 dozen eggs @ .79 per doz.
6 #10 cans whole tomatoes @ 1.23 per can

No.	Unit	Description	Unit Price	Extension

Total:

Assignment Sheet 2

Problem B: 8 pounds butter @ .88 per lb.
2 pounds salt @ .16 per lb.
4 bunches green onions @ .23 per bunch
6 2½ pound boxes frozen peas .36 per lb.
6 pounds tomatoes @ .45 per lb.
5 pounds corn starch @ .43 per lb.
8 #10 cans sliced peaches @ 1.96 per can

No.	Unit	Description	Unit Price	Extension

Total:

Problem C: 8 13-ounce cans tuna fish @ 1.36 per can
36 apples @ .98 per doz.
4 pounds margarine @ .59 per lb.
5 #10 cans sliced pineapple @ .89 per can
4 #10 cans cherries @ 2.30 per can
3 bunches celery @ .40 per bunch

No.	Unit	Description	Unit Price	Extension

Total:

Assignment Sheet 2

Problem D: 2 bunches carrots @ .22 per bunch
9 1-pound cans salmon @ 1.29 per can
5 2½ pounds boxes lima beans @ .38 per lb.
5½ pounds mushrooms @ 1.45 per lb.
3½ pounds romaine lettuce @ .84 per lb.

No.	Unit	Description	Unit Price	Extension

Total:

Problem E: 5 pounds cake flour @ 1.58 per lb.
5 pounds medium egg noodles @ .32 per lb.
3 #10 cans cut green beans @ 1.00 per can
2 2-pound cans of regular coffee @ 1.00 per lb.
6 5-pound boxes frozen mixed vegetables @ .38 per lb.
5 dozen eggs @ .79 per doz.

No.	Unit	Description	Unit Price	Extension

Total:

Storing and Issuing
Unit 6

Assignment Sheet 3—Complete a Physical Inventory

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Form is complete and correct	______

Directions: Make arrangements to visit your vo-tech's food service department, and use the form below to inventory 4 items in each category. Total the inventory.

Physical Inventory Form

Date: ____________________ Name: ________________________

Location: ____________________ Department: ________________

Category	Item	Pack	Quantity	Price	Extension
Meats	1) 2) 3) 4)				
Frozen Foods	1) 2) 3) 4)				
Dairy Products	1) 2) 3) 4)				

Assignment Sheet 3

Category	Item	Pack	Quantity	Price	Extension
Canned Goods	1)				
	2)				
	3)				
	4)				
Paper Goods	1)				
	2)				
	3)				
	4)				

Total:

Storing and Issuing
Unit 6

Assignment Sheet 4—Complete a Food Service Security Checklist

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are correct	______
Summary is well-written and complete	______

Directions: Decide if the following security procedures would relate to:

A. Hotel and Convention Food Service Operation (high volume)

B. Full Service Restaurant (medium volume)

C. Short Order Restaurant (low volume)

D. Improper Storage Procedure

Check the appropriate column/columns.

Security Procedure	A	B	C	D
1. Storeroom should be kept locked with only 1 set of keys in circulation.				
2. Storeroom keys should be kept locked in the office when storeroom is closed.				
3. Storeroom keys should be kept in unlocked drawer of assistant manager's desk.				
4. Morning storeroom person should take storeroom keys home so that keys will be available to open next morning.				
5. Only 1 set of keys to the kitchen spaces is in circulation.				
6. Kitchen keys should hang on a nail in the main kitchen.				
7. Breakfast cook should have a personal set of kitchen keys for speeding opening in the morning.				
8. A log book is kept in the office to record signing in and out of keys.				

Assignment Sheet 4

Security Procedure	A	B	C	D
9. Two signatures are required for each entry in logbook, the person signing in or out and the manager.				
10. Designated opening and closing hours of storeroom are maintained.				
11. When the storeroom must be opened after hours in an emergency situation, the manager on duty should accompany the person requesting merchandise.				
12. Salespeople inventory the food purchases and tell the purchaser the institution's requirements.				
13. A written requisition signed by an authorized person is required for all items.				
14. Storeroom person adds forgotten items to food requisitions which are phoned in by the cook.				
15. A dependable person is assigned the responsibility of locking all kitchen spaces at closing.				
16. Kitchen refrigerators and freezers are not locked overnight.				
17. All production food is placed in locked areas overnight.				
18. Employees are required to enter and leave through an employee entrance.				
19. All bundles are inspected before being taken from the premises.				
20. Restaurant condiments are stored in locked areas during hours when there is no service.				

Write a brief summary of the benefits of taking appropriate security procedures.

Personnel Management
Unit 7

Objective Sheet

Unit Objective

After completing this unit, the student should be able to write a classified ad, prepare for and conduct an interview, and train an employee in role play situations. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Match terms related to personnel management with their correct definitions.
2. Select means of locating new employees.
3. Complete statements concerning characteristics of an application form.
4. List purposes of an interview.
5. Complete a list of steps in preparing for an interview.
6. Select true statements concerning tips on interviewing.
7. Select items included in employee orientation.
8. List methods for training new employees.
9. Select true statements concerning basic guidelines for a good training program.
10. Arrange in order the steps in the four step training method.
11. List advantages of a good training program to management.
12. Select advantages of a good training program to employees.
13. Complete statements concerning techniques for giving instructions.
14. Select true statements concerning factors to consider for effective delegation.
15. List reasons for performance appraisals.

Objective Sheet

16. Select true statements concerning the procedure for administering performance appraisals.
17. Complete statements concerning methods of handling disciplinary problems.
18. Select true statements concerning factors to consider when terminating an unsatisfactory employee.
19. Write a classified ad. (Assignment Sheet 1)
20. Write interview questions. (Assignment Sheet 2)
21. Conduct an interview. (Assignment Sheet 3)
22. Train an employee using the four step training method. (Assignment Sheet 4)
23. Complete a questionnaire on the effectiveness of a performance appraisal system. (Assignment Sheet 5)

Personnel Management
Unit 7

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.

2. Review Teaching Suggestions section that follows. Plan for classroom activities.

3. Plan for enrichment of exceptional students as well as accommodation of special needs students.

4. Make a transparency from the transparency master included with this unit. This appears in the teacher guide only and is designed to be used with the following objective:

   TM 1—Performance Appraisal Form (Objective 16)

5. Obtain films, videotapes, and other resources to supplement instruction of this unit. See ordering information in the Suggested Supplemental Resources section that follows.

6. Develop teaching plan. Adjust for different learning styles.

7. Make copies of Unit Evaluation Form.

Delivery and Application

8. Provide students with unit of instruction.

9. Discuss unit and specific objectives.

10. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.

11. Discuss the assignment sheets. Review criteria for evaluation of these activities.

Evaluation

12. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.

13. Make copies of the written test. Add or modify test questions as needed.

Suggested Activities

14. Give written test.

15. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.

16. Reteach and retest as required.

Teaching Suggestions

Note: Skill areas appearing in bold face type in the Teaching Suggestions refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Discuss sources for locating employees in your area. (**Personal and career development**)

2. Check newspapers and trade journals for classified ads and discuss their effectiveness with students. (**Personal and career development**)

3. Invite a local food service manager to class to discuss methods of interviewing and what you should look for on an application to determine a good employee. (**Communication skills**)

4. Have students review several application forms and discuss pros and cons of answers given by the applicants. (**Problem solving**)

5. Review with class Unit II, "Applying for a Job," in MAVCC's *Food Production, Management, and Services: Introduction.*

6. Display tests which may be used to evaluate applicants for a food service job.

7. Discuss effectiveness of questions prepared by students in Assignment Sheet 2 and evaluate answers recorded in Assignment Sheet 3. Explain which answers indicate a positive strength in an applicant and how the interview can help management hire qualified employees.

8. Have students role play disciplinary problems and discuss solutions. (**Problem solving, organizational effectiveness**)

9. Make proper arrangements for students to visit a local vo-tech food service department to complete Assignment Sheet 5.

Suggested Activities

10. An alternative to having students visit a school in Assignment Sheet 5 would be to invite a local food service manager to visit the classroom to discuss performance appraisals. Students could complete this assignment during the presentation. (**Communication skills**)

11. Discuss fair employment practice laws and how they impact on an application form and interview questions. Have students review examples of application forms and lists of interview questions to determine if they comply with the law. (**Listening, reading**, and **problem solving**)

12. Assign students to teams of two and have them instruct each other on how to perform a specific food service task. Students should follow techniques for giving instruction (Objective 13). (**Oral communication, listening, interpersonal relations,** and **teamwork**)

Resources Used in Developing This Unit

1. Eshbach, Charles. *Food Service Management*, 3rd ed. New York: Van Nostrand Reinhold, 1983.

2. Knoll, Anne. *Food Service Management: A Humans Relations Approach*. New York: McGraw-Hill Book Co., 1975.

3. Lundberg, Donald and James Armatas. *Management of People in Hotels, Restaurants, and Clubs*, 4th ed. Dubuque, IA: Wm. C. Brown Co., Inc., 1980.

4. Palan, Earl. *Food Production, Management, and Services: Introduction*, 2nd ed. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1991.

Suggested Supplemental Resources

1. *Management Through Job Evaluation*, No. 5 of Nine-Part Series, MG 732

2. *Management Through Performance Appraisals*, No. 7 of Nine-Part Series, MG 756

3. *The First Day: A Checklist for Employee Orientation*, PT 350

4. *Developing an Employee Incentive Program*, CS 981

These supplemental books/booklets are available from:

National Restaurant Association
1200 Seventeenth Street, N.W.
Washington, DC 20039-3097
800-424-5156

Personnel Management
Unit 7

Answers to Written Test

1. a. 2
   b. 5
   c. 1
   d. 3
   e. 12
   f. 4
   g. 10
   h. 7
   i. 13
   j. 8
   k. 6

2. b, c, d, e, g

3. a. Direct
   b. Reference
   c. Fair employment

4. Any two of the following:

   a. To get information and characteristics about the applicant
   b. To give information about the job
   c. To promote good public relations

5. a. Job description
   b. Questions
   c. Application
   d. Policies

6. b, c, e, f

7. a, c, d, f

8. Any three of the following:

   a. Lectures
   b. Conferences
   c. Demonstrations
   d. Visual presentations
   e. On-the-job training

9. b, e, g

10. a. 4
    b. 1
    c. 3
    d. 2

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Answers to Written Test

11. Any three of the following:
    - a. More production
    - b. Better work habits
    - c. Lower operating costs
    - d. Less supervision needed
    - e. More skilled workers
    - f. Less labor turnover

12. a, c, e

13. a. Complete
    - b. Logical
    - c. Repeat
    - d. Accuracy

14. a, b, d, f

15. Any three of the following
    - a. Provides job recognition
    - b. Give incentive to employees
    - c. Provides means of quality control
    - d. Reduces turnover
    - e. Improves hiring practices
    - f. Provides basis for pay

16. a, e, f

17. a. Punished
    - b. Problem
    - c. Generalities
    - d. Employee
    - e. Solution

18. b, e

Personnel Management
Unit 7

Written Test

Name ______________________________ Score ______________

1. Match the terms on the right with their correct definitions.

______ a. Process by which information is exchanged between individuals in a manner in which it can be easily understood

______ b. To treat individuals differently on any basis other than individual merit

______ c. Selection tool used to obtain information about an applicant

______ d. To assign a task to a particular individual

______ e. To increase or maintain the number of employees in an organization

______ f. To correct an employee's conduct according to the established rules and regulations of an organization

______ g. Method of measuring an employee's work through established standards as set by management

______ h. To engage the services of an individual

______ i. Method of providing new employees with ideas and knowledge of the job and skills and to improve individual work habits

______ j. To evaluate the qualifications of an individual for a specific job by asking questions about the personal and work history of the applicant

______ k. Procedures used to allow all applicants an equal chance at a job; helps to prevent discrimination

1. Application form
2. Communication
3. Delegate
4. Discipline
5. Discriminate
6. Fair employment practice
7. Hire
8. Interview
9. Orientation
10. Performance appraisal (evaluation)
11. Personnel management
12. Recruitment
13. Training program

Written Test

2. Select means of locating new employees by placing an "X" in the appropriate blanks.

   ______a. Phone book

   ______b. Classified ad in local newspaper

   ______c. Public and private employment agencies

   ______d. Vocational schools

   ______e. Professional food service organizations

   ______f. Referrals by fired employees

   ______g. Human resource agencies

   ______h. Family members needing a job

3. Complete the following statements concerning characteristics of an application form by filling in the blanks.

   a. It should be phrased in simple and ________________ statements.

   b. Information required should include personal, education, work, and ________________ data.

   c. It must comply with ________________ ________________ practice laws.

4. List two purposes of an interview.

   a. ____

   b. ____

5. Complete the following list of steps in preparing for an interview.

   a. Prepare a ________________ listing specific responsibilities.

   b. Make a list of ________________ to ask applicant.

   c. Review individual's ________________ form.

   d. Assemble any brochures or company booklets outlining ________________ and benefits of the organization to give to applicant or to answer any questions that may be asked by applicant.

   e. Develop a plan for conducting interview.

   f. If tests will be administered, make sure they are relevant to position being filled and have papers available.

Written Test

6. Select true statements concerning tips on interviewing by placing an "X" in the appropriate blanks.

_______a. Interview the applicant in noisy surroundings.

_______b. Be pleasant and courteous and put the applicant at ease.

_______c. Know the facts about the job, and ask questions which will help you determine the individual's ability in performing the job.

_______d. Interrupt the applicant.

_______e. Allow enough time to complete the interview without rushing the applicant.

_______f. Take notes that will help you remember specific points (positive and negative) about an applicant.

_______g. Do not have supervisor for area in which job is located interview applicant.

7. Select items included in employee orientation by placing an "X" in the appropriate blanks.

_______a. Organizational structure

_______b. Personal history of employees

_______c. Deductions made from paychecks

_______d. Time allowed for meals

_______e. Personal policy on tardiness

_______f. Benefits

8. List three methods for training new employees.

a. ____

b. ____

c. ____

Written Test

9. Select true statements concerning basic guidelines for a good training program by placing an "X" in the appropriate blanks.

______a. Conduct away from the job.

______b. Stress hands-on training with immediate practical application.

______c. Stress safety and sanitation last.

______d. Gear to above average learning abilities.

______e. Use positive reinforcement to keep employee motivated.

______f. Use long sessions on only one subject.

______g. Use visual aids to strengthen employee interest and improve memory.

10. Arrange in order the steps in the four step training method by placing the correct sequence numbers (1-4) in the blanks.

______a. Follow up

______b. Explain

______c. Try out

______d. Demonstrate

11. List three advantages of a good training program to management.

a. ______________________________

b. ______________________________

c. ______________________________

12. Select advantages of a good training program to employees by placing an "X" in the appropriate blanks.

______a. More job satisfaction

______b. Less earning power

______c. More chance for advancement

______d. No need for instructions

______e. Greater sense of security

______f. Less motivation

Written Test

13. Complete the following statements concerning techniques for giving instructions by filling in the blanks.

    a. Give clear and ________________ instructions.

    b. Explain in a ________________ sequence, and review with employee to make sure nothing has been omitted.

    c. Ask employees to ________________ instructions.

    d. Review complicated instructions, and check them for ________________ and completeness before giving them to employee.

14. Select true statements concerning factors to consider for effective delegation by placing an "X" in the appropriate blanks.

    ______a. Determine what can be delegated, and then select your employee carefully.

    ______b. Make it clear what responsibilities you are delegating.

    ______c. Assign the task to more than one person.

    ______d. Notify the staff involved of your decision to make the assignment.

    ______e. Delegate for the methods used in achieving them.

    ______f. Follow up to ensure task is completed correctly.

15. List three reasons for performance appraisals.

    a. ____

    b. ____

    c. ____

16. Select true statements concerning the procedure for administering performance appraisals by placing an "X" in the appropriate blanks.

    ______a. Appraisals should be conducted by immediate supervisor of each employee.

    ______b. Supervisor and employee should discuss making any pertinent comments on form, and then parent should sign it.

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_______c. Supervisor should review and discuss each employee appraisal with other employees.

_______d. Employees dissatisfied with their ratings should be given an opportunity to discuss their ratings with co-workers.

_______e. A follow up review should be conducted to check on deficiencies, problems, or exceptions.

_______f. A copy of each performance appraisal should be given to the employee, the appropriate supervisor, and be placed in the employee's personal file.

17. Complete the following statements concerning methods of handling disciplinary problems by filling in the blanks.

a. Determine if employee will be corrected or ____________________.

b. State the ____________________ or explain the situation. Use written documentation.

c. Avoid ____________________; be specific.

d. Get ____________________ to agree there is a problem.

e. Help the employee find a ____________________ to the problem.

18. Select true statements concerning factors to consider when terminating an unsatisfactory employee by placing an "X" in the appropriate blanks.

_______a. Act in haste.

_______b. Review the situation to ensure that every opportunity has been given for employee to correct the situation.

_______c. Discuss situation with the unsatisfactory employee's co-workers before making a final decision.

_______d. Make the dismissal interview as long and painful as possible.

_______e. Act with consideration in dealing with the dismissed employee.

*Permission to duplicate this test is granted.

Personnel Management
Unit 7

Unit Evaluation Form

Student Name ______________________ Unit Rating __________

Assignment Sheet 1—Write a Classified Ad Rating ______

Comments: ______________________________

____

Assignment Sheet 2—Write Interview Questions Rating ______

Comments: ______________________________

____

Assignment Sheet 3—Conduct an Interview Rating ______

Comments: ______________________________

____

Assignment Sheet 4—Train an Employee Using the Four Step Training Method Rating ______

Comments: ______________________________

____

Assignment Sheet 5—Complete a Questionnaire on the Effectiveness of a Performance Appraisal System Rating ______

Comments: ______________________________

____

Written Test Scores

Pretest ______ Posttest ______ Other ______

Other ______________________________

____

Teacher Signature ______________________ Date __________

Student Signature ______________________ Date __________

***Permission to duplicate this form is granted.**

Performance Appraisal Form

NAME: ______________________ SOCIAL SECURITY NUMBER: ___-___-____

DEPARTMENT: ______________________ POSITION AND GRADE: ____________

DATE OF EVALUATION: ____________ TYPE OF EVALUATION: ____________

Rating System: S—Satisfactory N—Needs Improvement U—Unsatisfactory

______ 1. **Quality of work** (neatness, thoroughness, accuracy, etc.)

______ 2. **Quantity of work** (fair work load, effective use of time, etc.)

______ 3. **Job knowledge** (appropriate techniques used)

______ 4. **Cooperativeness** (follows policies, helps others)

______ 5. **Dependability** (reliable, works without constant supervision)

______ 6. **Attendance** (punctual, good use of leave and break privileges)

______ 7. **Attitude** (good attitude toward others)

______ 8. **Physical condition** (good health, hygiene, appearance)

______ 9. **Adaptability** (can change to meet new situations)

______10. **Housekeeping and safety** (safe use and care of materials)

Overall rating: ____________

Recommendations: ____

____

____

Supervisor's Signature ______________________ Date ____________

Employee's Signature ______________________ Date ____________

Employee's Comments: ____

____

____

Personnel Management
Unit 7

Information Sheet

1. **Terms and definitions**

   a. **Application form** — Selection tool used to obtain information about an applicant

   b. **Communication** — Process by which information is exchanged between individuals in a manner in which it can be easily understood

   c. **Delegate** — To assign a task to a particular individual

   d. **Discipline** — To correct an employee's conduct according to the established rules and regulations of an organization

   e. **Discriminate** — To treat individuals differently on any basis other than individual merit

   f. **Fair employment practice** — Procedure used to allow all applicants an equal chance at a job; helps to prevent discrimination

   g. **Hire** — To engage the services of an individual

   h. **Interview** — To evaluate the qualifications of an individual for a specific job by asking questions about the personal and work history of the applicant

   i. **Orientation** — To acquaint new employees with surroundings and policies of an organization

   j. **Performance appraisal (evaluation)** — Method of measuring an employee's work through established standards as set by management

   k. **Personnel management** — Management of people as people

   l. **Recruitment** — To increase or maintain the number of employees in an organization

   m. **Training program** — Method of providing employees with ideas and knowledge of the job and skills and to improve individual work habits

   Note: A good training program is oriented around the operation itself and its goals and should benefit both the employees and management.

Information Sheet

2. **Means of locating new employees** (Assignment Sheet 1)

   a. Referrals by present or former employees

   b. Classified ad in local newspaper

   c. Public and private employment agencies

   d. Professional food service organizations

   e. Vocational schools

   f. Two and four year colleges

   g. Human resource agencies

   Examples: Churches, social and civic organizations, vocational rehabilitation centers

3. **Characteristics of an application form**

   a. It should be phrased in simple and direct statements.

   b. Information required should include personal, education, work, and reference data.

   c. It must comply with fair employment practice laws.

4. **Purposes of an interview**

   Note: Remember the interview is for both the interviewer and applicant. The interviewer learns about the applicant, and the applicant learns about the job.

   a. To get information and characteristics about the applicant

   b. To give information about the job

   c. To promote good public relations

   Note: Remember every applicant is a potential customer.

Information Sheet

5. **Steps in preparing for an interview** (Assignment Sheet 2)

    a. Prepare a job description listing specific responsibilities.

    b. Make a list of questions to ask applicant.

    Note: Check with your state employment agency about questions you can/can't ask.

    c. Review individual's application form.

    d. Assemble any brochures or company booklets outlining policies and benefits of the organization to give to applicant or to answer any questions that may be asked by applicant.

    e. Develop a plan for conducting the interview.

    f. If tests will be administered, make sure they are relevant to position being filled and have papers available.

6. **Tips on interviewing** (Assignment Sheet 3)

    a. Interview the applicant in quiet surroundings.

    b. Be pleasant and courteous and put the applicant at ease.

    c. Know the facts about the job, and ask questions which will help you determine the individual's ability in performing the job.

    d. Be a good listener; don't interrupt applicant.

    e. Allow enough time to complete the interview without rushing the applicant.

    f. Take notes that will help you remember specific points (positive and negative) about an applicant.

    g. If possible, have supervisor for area in which job is located interview applicant briefly.

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Information Sheet

7. Items included in employee orientation

a. Introduction to establishment
  (1) History
  (2) Policies and goals
  (3) Description of employee's job
  (4) Training procedures

b. Organizational structure
  (1) Chart of departments and supervisory levels
  (2) Where employee fits in the organization
  (3) To whom employee reports

c. Payroll policies
  (1) When payday is
  (2) Length of pay periods
  (3) Deductions made from paycheck
  (4) Management policy on lost checks or advances

d. Work schedules
  (1) Hours employee will work
  (2) How changes in schedule will be made
  (3) Overtime
  (4) Management policy on absenteeism
  (5) Management policy on tardiness
  (6) Holidays establishment is open

Information Sheet

- e. Breaks and meals
    - (1) Break times
    - (2) Time allowed for meals
    - (3) Meal cost, if any
- f. Benefits
    - (1) Vacations
    - (2) Sick leave
    - (3) Holidays
    - (4) Insurance
    - (5) Profit sharing
    - (6) Credit union
    - (7) Bonus
    - (8) Educational assistance

8. **Methods for training new employees**
    - a. Lectures
    - b. Conferences
    - c. Demonstrations
    - d. Visual presentations
    - e. On-the-job training

      Note: This is the most common training method.

9. **Basic guidelines for a good training program**
    - a. Conduct on the job.
    - b. Stress hands-on training with immediate practical application.
    - c. Stress safety and sanitation first.

Information Sheet

- d. Gear to individual employee learning ability.
- e. Use positive reinforcement to keep employee motivated.
- f. Avoid long sessions on only one subject.
- g. Use visual aids to strengthen employee interest and improve memory.

10. **Four step training method** (Assignment Sheet 4)

    a. **Explain**

        (1) Prepare the worker—Put at ease, state the benefits of the task, find out what employee knows about task.

        (2) Explain the task—Break task into steps; stress why, where, when, and how.

    b. **Demonstrate**

        (1) Tell, show, illustrate, summarize by stressing the key points.

        (2) Demonstrate in same order that you explained it.

    c. **Try out**

        (1) Employee explains the task before demonstrating to make sure he/she understands the task.

        (2) Ask questions to ensure understanding.

        (3) Continue the try-out until employee thoroughly understands the task.

    d. **Follow-up**

        (1) Put employee on own.

        (2) Check on employee by asking questions, correcting (privately), and rewarding (publically).

        (3) Taper off supervision.

Information Sheet

11. **Advantages of a good training program to management**
    a. More production
    b. Better work habits
    c. Lower operating costs
    d. Less supervision needed
    e. More skilled workers
    f. Less labor turnover

12. **Advantages of a good training program to employee**
    a. More job satisfaction
    b. Greater earning power
    c. More chance for advancement
    d. Greater sense of security
    e. More motivation

13. **Techniques for giving instruction**
    a. Give clear and complete instructions.
    b. Explain in a logical sequence, and review with employee to make sure nothing has been omitted.
    c. Ask employee to repeat instructions.
    d. Review complicated instructions, and check them for accuracy and completeness before giving them to employee.

14. **Factors to consider for effective delegation**

    Note: A good manager should be willing to delegate jobs to other staff members.

    a. Determine what can be delegated, and then select your employee carefully.
    b. Make it clear what responsibilities you are delegating.

       Note: Make it clear which decisions the employee can make and which ones you need to make.

Information Sheet

c. Assign the task to one person only.

d. Notify the staff involved of your decision to make the assignment.

e. Delegate for results, not for the methods used in achieving them.

f. Follow up to ensure task is completed correctly.

15. **Reasons for performance appraisals**

a. Provides job recognition

b. Give incentive to employees

c. Provides means of quality control

d. Reduces turnover

e. Improves hiring practices

f. Provides basis for pay

Note: Performance appraisals are valid and reliable means of providing equal pay for equal work.

16. **Procedure for administering performance appraisals** (Assignment Sheet 5)

a. Appraisal should be conducted by immediate supervisor of each employee.

b. Supervisor and employee should discuss appraisal making any pertinent comments on appraisal form, and then employee should sign it.

c. Supervisor should review and discuss each employee appraisal with superior and obtain approval.

d. Employees dissatisfied with their ratings should be given an opportunity to discuss their ratings with supervisor's superior.

e. A follow up review should be conducted to check on deficiencies, problems, or exceptions.

f. A copy of each performance appraisal should be given to the employee, the appropriate supervisor, and be placed in the employee's personal file.

Note: An employee's outstanding performance should be recognized and rewarded.

Information Sheet

17. **Methods of handling disciplinary problems**

    a. Determine if employee will be corrected or punished.

    Note: In some cases, dismissal of the employee may be necessary.

    b. State the problem or explain the situation. Use written documentation with names, dates, times, and all pertinent information.

    c. Avoid generalities; be specific.

    d. Get employee to agree there is a problem.

    e. Explain the consequences.

    f. Help the employee find a solution to the problem.

    g. Follow up to ensure compliance.

18. **Factors to consider when terminating an unsatisfactory employee**

    a. Don't act in haste.

    b. Review the situation to ensure that every opportunity has been given for employee to correct the situation.

    c. Discuss situation with the unsatisfactory employee before making a final decision. Present written documentation.

    d. Make the dismissal interview as short and painless as possible.

    e. Act with consideration in dealing with the dismissed employee.

    Note: Remember, the employee may be a future customer. Maintain good relations.

Personnel Management
Unit 7

Assignment Sheet 1—Write a Classified Ad

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Ad is well-written and complete	_____
Ad contains only necessary information	_____

Directions: Write a classified ad for a local newspaper in your area using the following information as a guide. It is not necessary to list everything. Select the items you feel would be important in recruiting new employees.

1. Waiter/waitress position
2. Hours 10:00 a.m.-7:00 p.m.
3. High school graduate
4. No experience necessary
5. Minimum wage + tips
6. Some meals furnished
7. Uniforms provided
8. Smith's Restaurant
   2000 North Broadway
9. Equal Opportunity Employer (EOE)
10. Fun place to work

Personnel Management
Unit 7

Assignment Sheet 2—Write Interview Questions

Name ____________________ Overall Rating __________

Evaluation criteria	**Rating**
Questions are appropriate for position	______
Questions are well-written and complete	______

Directions: Write ten question you might ask an applicant who is interviewing for a waiter/waitress position in your food service establishment. Refer to the information sheet in this unit and to Assignment Sheet 1 for specific information to assist you in developing your questions.

Note: Remember to ask questions that will help you evaluate the individual's ability to handle the job.

Examples: How did you happen to apply here?
How would you handle the guest who never tips?
What would you do if you felt you were being treated unfairly in your station assignments?

1. ____________________

2. ____________________

3. ____________________

4. ____________________

5. ____________________

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Assignment Sheet 2

6. ____

____

7. ____

____

8. ____

____

9. ____

____

10. ____

____

Personnel Management
Unit 7

Assignment Sheet 3—Conduct an Interview

Name ________________________________ Overall Rating ____________

Evaluation criteria	**Rating**
Interviewer is courteous and acts appropriately	______
Interviewer asks questions clearly, with interest	______
Interviewer listens well and records answers correctly	______

Directions: Using the list of questions you developed in Assignment Sheet 2, conduct an interview to fill a waiter/waitress position. Check with your instructor to determine who will role play as the applicant. Record the answers for class discussion and evaluation at a later date.

1. ____
____

2. ____
____

3. ____
____

4. ____
____

5. ____
____

6. ____
____

Assignment Sheet 3

7. ______________________________

____

8. ______________________________

____

9. ______________________________

____

10. ______________________________

____

Personnel Management
Unit 7

Assignment Sheet 4—Train an Employee Using the Four Step Training Method

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Trainer's attitude and behavior are appropriate	______
All four steps are covered well	______
Trainee learns task	______

Directions: Choose a simple task that you are very familiar with such as tieing an apron or making a sandwich. Refer to the information pages to assist you in making notes to prepare for the training and what you will say. Check with your instructor to determine who will role play as the trainee. Use your notes throughout the training session. Ask your instructor and class to evaluate your performance.

Four Step Training Method

Objective: After this training the employee will ______________________________

Step 1. Explain:

a. Prepare the employee: ______________________________

____

____

b. Explain the task: ______________________________

____

____

____

Assignment Sheet 4

Step 2. Demonstrate:

a. Tell: ______________________________

b. Show and illustrate: ______________________________

c. Summarize the task: ______________________________

Step 3. Try Out:

a. Have employee explain the task: ______________________________

b. Have employee perform task: ______________________________

c. Continue until employee thoroughly understands task.

Step 4. Follow-up

a. Observe employee performing task: ______________________________

b. Correct (if needed): ______________________________

c. Reward: ______________________________

Personnel Management
Unit 7

Assignment Sheet 5—Complete a Questionnaire on the Effectiveness of a Performance Appraisal System

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
All questions are answered	______
Answers are well-written and complete	______
Comments are appropriate	______

Directions: Make an appointment with the manager of your vo-tech food service operation to obtain information needed to complete the following questionnaire on the effectiveness of a performance appraisal system.

1. How often are performance appraisals conducted?

____

____

____

2. Who conducts the appraisals?

____

____

____

3. Are all employees appraised?

____

____

____

Assignment Sheet 5

4. How long does it take to conduct a performance appraisal?

5. What type of scoring system is used to evaluate job performance?

6. Is the employee present during the appraisal?

7. Are appraisals made with/without resulting pay increases?

8. Are appraisals used as a tool in promotion?

9. Are appraisals reviewed by top management personnel?

Assignment Sheet 5

10. Do employees have a means of appealing an unsatisfactory appraisal to their supervisor's superiors?

11. What happens if an employee receives a substandard appraisal?

12. Can a poor appraisal be cause for dismissal?

13. Do you feel a performance appraisal system has a positive or negative effect on employees?

14. Comments:

Human Relations
Unit 8

Objective Sheet

Unit Objective

After completing this unit, the student should be able to initiate change, encourage cooperation, and solve employee problems. The student should demonstrate these competencies by completing the assignment sheets and by scoring a minimum of 85 percent on the written test.

Specific Objectives

After completing this unit, the student should be able to:

1. Match terms related to human relations with their correct definitions.
2. Select true statements concerning goals of management regarding human relations.
3. Complete statements concerning ways to recognize a good employee.
4. Select true statements concerning the procedure for initiating change.
5. Complete statements concerning techniques for encouraging cooperation.
6. Select true statements concerning ways to deal with employee problems.
7. Select true statements concerning guidelines for listening improvement.
8. Solve problems concerning initiating change in the work environment. (Assignment Sheet 1)
9. Solve problems concerning techniques for encouraging cooperation. (Assignment Sheet 2)
10. Solve problems concerning ways to deal with employee problems. (Assignment Sheet 3)

Human Relations
Unit 8

Suggested Activities

Instructional Plan

Preparation

1. Read the unit carefully and plan for instruction.

2. Review Teaching Suggestions section that follows. Plan for classroom activities.

3. Plan for enrichment of exceptional students as well as accommodation of special needs students.

4. Obtain films, videotapes, and other resources to supplement instruction of this unit. See ordering information in the Suggested Supplemental Resources section that follows.

5. Develop teaching plan. Adjust for different learning styles.

6. Make copies of Unit Evaluation Form.

Delivery and Application

7. Provide students with unit of instruction.

8. Discuss unit and specific objectives.

9. Discuss information sheet. Implement teaching plan to localize, supplement, and personalize the unit. Reinforce basic skills when applicable.

10. Discuss assignment sheets. Review criteria for evaluation of these activities.

Evaluation

11. Discuss the use of the Unit Evaluation Form with students. Discuss the rating scale that will be used for student evaluation.

12. Make copies of the written test. Add or modify test questions as needed.

13. Give written test.

14. Compile assignment sheet ratings and written test scores on the Unit Evaluation Form. Include any additional assignments.

15. Reteach and retest as required.

Suggested Activities

Teaching Suggestions

Note: Skill areas appearing in bold face type in the Teaching Suggestions refer to the academic and workplace skills identified by the American Society for Training and Development (ASTD) and the U.S. Department of Labor. These have been adapted by MAVCC.

1. Have students interview a food service manager on the best ways to motivate employees. (**Communication skills, interpersonal relations**)

2. Provide food service trade journals and have students read and report on at least three articles dealing with human relations. (**Foundation skills—reading and writing, communication skills**)

3. Review Unit 3, "Human Relations," in MAVCC's *Food Production, Management, and Services: Introduction* with students.

4. Invite a food service manager to class to discuss employee turnover and to discuss effective ways to deal with the problem. (**Communication skills**)

5. To emphasize the importance of constructive criticism, give students examples of destructive criticism, and have them modify these examples in writing into constructive criticism. Then have a class discussion on the advantages of using constructive criticism. (**Foundation skills—reading and writing, communication skills, creative thinking**, and **interpersonal relations**)

6. As a group project, have students compile a list of resources in their community that can be used to assist a manager in dealing with serious employee problems such as alcohol/drug dependency, compulsive gambling, marital difficulties (divorce), and financial problems. Discuss their findings in class. (**Foundation skills—writing, communication skills, creative thinking, teamwork**, and **problem solving**)

7. Assign students to a team of three, and have them practice their listening skills following the guidelines presented in Objective 7. Let them select a topic of discussion that might take place between a manager and an employee. Then have the two students role play the situation. The third student should act as an observer. Upon completion of the discussion, have each student write down what they heard. Compare responses. This helps students understand that many communication problems are because of ineffective listening. Often the manager or the employee can only see one side of a situation. The observer should help them see both sides. (**Communication skills, teamwork**, and **interpersonal relations**)

Suggested Activities

Resources Used in Developing This Unit

1. Brymer, Robert. *Introducation to Hotel and Restaurant Management*, 5th ed. Dubuque, IA: Kendall-Hunt Publishing Co., 1987.
2. Eshbach, Charles. *Food Service Management*, 3rd ed. New York: Van Nostrand Reinhold, 1983.
3. Lundberg, Donald and James Armatas. *Management of People in Hotels, Restaurants, and Clubs*, 4th ed. Dubuque, IA: Wm. C. Brown Co., Inc., 1980.
4. Palan, Earl. *Food Production, Management, and Services: Introduction*, 2nd ed. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1992.
5. Stokes, John. *How to Manage a Restaurant or Insitutional Food Service*, 4th ed. Dubuque, IA: Wm. C. Brown Co., 1982.

Suggested Supplement Resources

Profitable Foodservice Management, a nine-part series of books; may be purchased as a set or individually. The following would be especially useful in this unit:

1. *Management Through Good Supervision* (No. 3)
2. *Management Through Reduction of Employee Turnover* (No. 4)
3. *Management Through Worker Motivation* (No. 6)
4. *Management Through Employee Counseling and Intercommunications* (No. 8)

These are available from:

National Restaurant Association
1200 Seventeenth Street, N.W.
Washington, D.C. 20039-3097

Human Relations
Unit 8

Answer to Written Test

1. a. 7
   b. 6
   c. 2
   d. 5
   e. 8
   f. 1
   g. 3

2. d, e, f

3. a. Advice
   b. Decision-making
   c. The business
   d. Train
   e. Honors

4. d, e

5. a. Informed
   b. Circulate among
   c. Giving orders
   d. Criticism

6. a, b, c

7. a, d, e

Human Relations
Unit 8

Written Test

Name ______________________________ Score ______________

1. Match the terms on the right with their correct definitions.

______a. To oversee, direct, or manage the work of others

______b. Employee's attitude toward the organization with respect to confidence, enthusiasm, and willingness to work

______c. Process of choosing a course of action to solve a specific problem

______d. A study of human problems designed to develop better interpersonal relationships

______e. Physical conditions present in the work area

______f. Evaluation of a person's performance that includes suggestions for improvement and development

______g. To understand and be sensitive to the feelings of others

1. Constructive criticism
2. Decision making
3. Empathy
4. Feedback
5. Human relations
6. Morale
7. Supervise
8. Work environment

2. Select true statements concerning goals of management regarding human relations by placing an "X" in the appropriate blanks.

______a. To promote pleasant work relationships only with supervisors in the work environment

______b. To foster and maintain good employee morale which will result in higher turnover and lower productivity

______c. To enhance the reputation of the manager by providing better service to guests

______d. To reduce the friction between people in the work environment

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Written Test

______e. To assist in the development of employee loyalty to the organization

______f. To make the supervisor's job easier

3. Complete the following statements concerning ways to recognize a good employee by circling the best answers.

   a. Seek their (advice, friendship) regularly.

   b. Give them (unimportant, decision-making) responsibility.

   c. Ask them for suggestions about (the business, your hair style).

   d. Assign them to (hire, train) new employees.

   e. Award them with (honors, more work).

4. Select true statements concerning the procedure for initiating change by placing an "X" in the appropriate blanks.

   ______a. Avoid discussion of change with employees.

   ______b. Stress the negative aspects of the change, as well as the benefits it will provide.

   ______c. Downgrade past methods.

   ______d. Allow for employee adjustment.

   ______e. Follow up to make sure change is providing satisfactory results.

5. Complete the following statements concerning techniques for encouraging cooperation by circling the best answers.

   a. Keep employees (informed, uninformed).

   b. (Avoid, Circulate among) employees and break down the barrier of your office.

   c. Use the "What do you think?" approach for (giving orders, assigning new jobs).

   d. Give constructive (criticism, compliments) firmly but quietly.

Written Test

6. Select true statements concerning ways to deal with employee problems by placing an "X" in the appropriate blanks.

   ______a. Be willing to listen to employee's problems.

   ______b. Develop good listening habits to gain insight into employee's personality.

   ______c. Help employees solve their problems on their own.

   ______d. Listen sympathetically and ask about employee's personal affairs.

   ______e. Advise employees with serious personal problems to consult with friends.

7. Select true statements concerning guidelines for listening improvement by placing an "X" in the appropriate blanks.

   ______a. Listen for the meaning.

   ______b. Do not try to understand their point of view.

   ______c. Listen with a closed mind. Employees do not have new ideas.

   ______d. Listen carefully for details.

   ______e. Give and get feedback.

***Permission to duplicate this test is granted.**

Human Relations
Unit 8

Unit Evaluation Form

Student Name ______________________________ Unit Rating __________

Assignment Sheet 1—Solve Problems Concerning Initiating Change in the Work Environment Rating ______

Comments: ____

____

Assignment Sheet 2—Solve Problems Concerning Techniques for Encouraging Cooperation Rating ______

Comments: ____

____

Assignment Sheet 3—Solve Problems Concerning Ways to Deal with Employee Problems Rating ______

Comments: ____

____

Written Test Scores

Pretest ______ Posttest ______ Other ______

Other ____

____

Teacher Signature ______________________________ Date __________

Student Signature ______________________________ Date __________

*Permission to duplicate this form is granted.

Human Relations
Unit 8

Information Sheet

1. **Terms and definitions**

   a. **Constructive criticism** — Evaluation of a person's performance that includes suggestions for improvement and development

   Note: Criticism from a manager should include both what the employee is doing well and what he/she needs to improve. Criticism should be helpful to the employee, not demoralizing.

   Examples: **Destructive Criticism** — "You are messy, dirty, and you smell bad!"

   Constructive Criticism — "Pat, I want you to spend more time getting ready for work. We all have to bathe, wash our hair, and wear neat, clean uniforms. If you would do this every day, you would be one of our best employees. You are a very hard worker, and you are always on time. Now if you could spend a little more time on your appearance, you would be top-rate!"

   b. **Decision making** — Process of choosing a course of action to solve a specific problem

   c. **Empathy** — To understand and be sensitive to the feelings of others

   d. **Feedback** — Information returned to the source that helps to evaluate an action or process

   e. **Human relations** — A study of human problems designed to develop better interpersonal relationships

   f. **Morale** — Employee's attitude toward the organization with respect to confidence, enthusiasm, and willingness to work

   g. **Supervise** — To oversee, direct, or manage the work of others

   h. **Work environment** — Physical conditions present in the work area

2. **Goals of management regarding human relations**

   a. To promote pleasant work relationships in the work environment

   b. To foster and maintain good employee morale which will result in lower turnover and better productivity

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Information Sheet

- c. To enhance the reputation of the organization by providing better service to guests
- d. To reduce the friction between people in the work environment
- e. To assist in the development of employee loyalty to the organization
- f. To make the supervisor's job easier

3. **Ways to recognize a good employee**
   - a. Seek their advice regularly.
   - b. Give them decision-making responsibility.
   - c. Ask them for suggestions about the business.
   - d. Assign them to train new employees.
   - e. Delegate them to a short term task.

     Examples: Inventory, catering
   - f. Award them with special assignments or honors.

     Examples: Have them participate in special training, appoint them to a committee

4. **Procedure for initiating change**
   - a. Discuss change with employees as soon as possible.
   - b. Know the answers to any questions that might by asked before announcing a major change.
   - c. Stress the positive aspects of the change, such as the benefits it will provide.
   - d. Do not downgrade past methods.
   - e. Allow for employee adjustment.
   - f. Follow up to make sure change is providing satisfactory results.

Information Sheet

5. Techniques for encouraging cooperation

a. Keep employees informed.

b. Circulate among employees and break down the barrier of your office.

c. Use the "What do you think?" approach for giving orders.

d. Give constructive criticism firmly but quietly.

Note: Your objective is to increase cooperation, not resentment.

e. Keep alert for troublemakers who can disrupt the entire operation.

6. Ways to deal with employee problems

a. Be willing to listen to employee's problems.

b. Develop good listening habits to gain insight into employee's personality.

c. Help employees solve their problems on their own.

d. Listen sympathetically, but do not pry in to employee's personal affairs.

Note: Remember, you seldom have enough facts to make concrete suggestions.

e. Advise employees with serious personal problems to consult with experts in that field.

7. Guidelines for listening improvement

a. Listen actively. Have a desire to listen; get involved.

b. Listen for the meaning.

c. Listen with empathy to understand their point of view.

d. Listen with an open mind. Do not be defensive. Be open to new ideas and their suggestions.

e. Listen carefully for details and feelings.

f. Give and get feedback. Ask questions to understand.

Example: "You're saying you feel you should have been informed about the change?"

Human Relations
Unit 8

Assignment Sheet 1—Solve Problems Concerning Initiating Change in the Work Environment

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are appropriate for situations described	______

Directions: Solve the following problems concerning initiating change in the work environment. Use the information provided in this unit as a reference.

A. Over the weekend Manager Jon Patterson decided to rearrange the dining room at his restaurant to seat more customers. On Monday morning, when his staff arrived, everyone acted upset and confused about the change. As he passed the group on the way to his office, he heard one of the employees say, "Who does he think he is? The least he could have done was tell us about it." After a few minutes in the office Jon realized the employees were still standing around talking about the change. At this point he stepped out of his office and said, "Okay, let's get to work." But one employee shouted, "Aren't you going to tell us why you rearranged the seating? We'll have to work twice as hard, and it will be awkward moving between tables to serve the additional customers." Jon responded, "Just be glad you have a job. Besides, you had it too easy before."

1. What did Jon do right/wrong?

2. What would you do to implement this type of change?

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Assignment Sheet 1

B. Amy Chen, manager of the Honey Bun Donut Shop, decided to extend her store hours effective June 1st. Since this would necessitate a change in employee work schedules, she called a meeting for May 1st to discuss her reasons for changing the hours and to get input from the employees as to when they would like to work. Amy told them the extended hours could double the business, and if it picked up, she would be able to offer more benefits such as paid sick leave and annual leave, better wages, and possible job advancement. Amy concluded the meeting by stating that if the anticipated increase in business did not materialize, she would reconsider her decision and make the appropriate changes.

1. What did Amy do right/wrong?

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2. What would you do to implement this type of change?

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Human Relations
Unit 8

Assignment Sheet 2—Solve Problems Concerning Techniques for Encouraging Cooperation

Name ______________________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are appropriate for situations described	______

Directions: Solve the following problems concerning techniques for encouraging cooperation. Use the information provided in this unit as a reference.

A. Maria Hartley is the supervisor of the salad area in the kitchen at Steak 'n Spuds Restaurant. She makes a point of criticizing employees out in the open so everyone will know she's a tough supervisor. One day Maria was criticizing an employee for poor production when her supervisor walked in. When she finished, the supervisor, Ms. Gamble, called her in the office and asked, "Do you always discipline your workers in public?" Maria responded, "Yes, I want everyone to know that I don't stand for any nonsense or poor work." At this point Ms. Gamble said, "How would you feel if I started yelling about your performance in front of other employees? It's apparent to me you don't know how to tell an employee that a problem exists without causing embarrassment to the individual and creating ill will."

How should Maria handle problem situations without losing the cooperation of her employees?

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Assignment Sheet 2

B. Charlie Thomas, the manager of T's Truck Stop Cafe, decided to implement a new procedure for placing and picking up orders which would affect both the kitchen staff and waitresses in that establishment. He went to each of the employees that would be affected by the change and asked them what they thought. After compiling the suggestions and deciding on the new procedure to be followed, he called a meeting and informed the employees as to what the new procedure would be and when it would take effect.

Do you think Charlie will get cooperation from his employees? Why or why not?

Human Relations
Unit 8

Assignment Sheet 3—Solve Problems Concerning Ways to Deal With Employee Problems

Name ______________________ Overall Rating __________

Evaluation criteria	**Rating**
Answers are appropriate for situations described	______

Directions: Solve the following problems concerning ways to deal with employee problems. Use the information provided in this unit as a reference.

A. Alexander, manager of a fast foods operation, liked to be part of the group and enjoyed discussing the employees' personal problems with them. He was always pleased when someone asked his advice, and he was more than glad to advise them. Often, he would ask for more information about the employee's personal affairs before responding.

Is Alexander handling employee problems wisely? Why or why not?

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Assignment Sheet 3

B. When Sarah noticed that one of her best employees was missing work frequently and performing poorly, she called him in and asked him what the problem was. Jim, the cook's assistant, was having problems because his wife objected to him having an evening "with the boys" when she had to stay home all day with the baby. Thinking she knew the answer, Sarah gave this advise: "Did you ever stop to think that your wife would like to get out once in a while too? Being shut in with a baby all day can really get on your nerves. How about hiring a babysitter this weekend so the two of you can go out together?" Sarah thought her advice was sound. Unfortunately, Jim continued to have marital problems, and a couple of months later he didn't show up at work for a week. Finally he called and asked that his paycheck be mailed to him. His marriage had broken up, and he was too embarrassed to face his fellow workers.

Was Sarah right/wrong to give him advice? Why?

What could she have done to help the employee without becoming personally involved?